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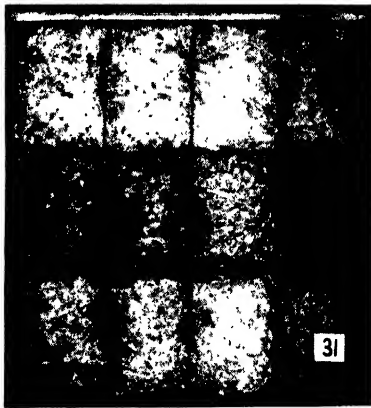
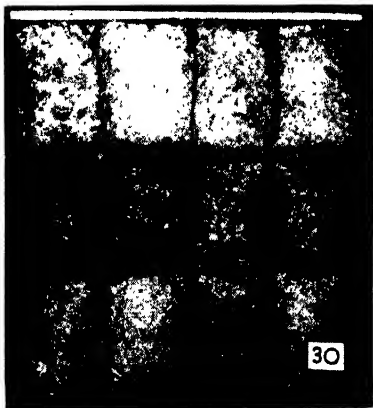
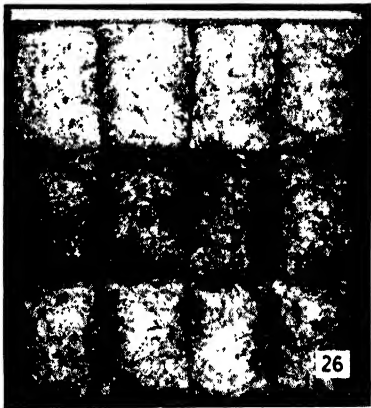
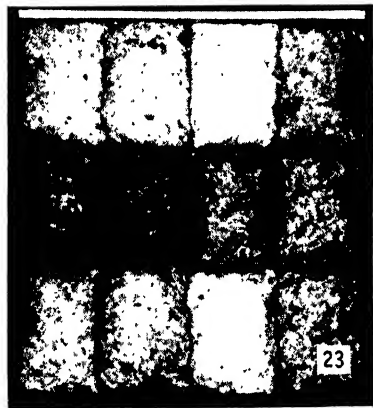
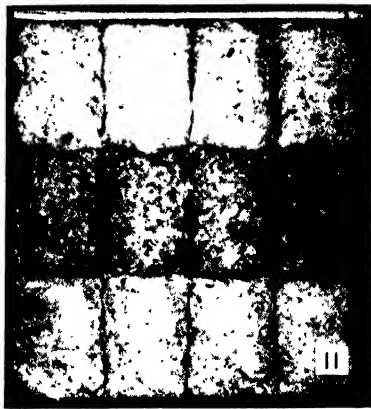
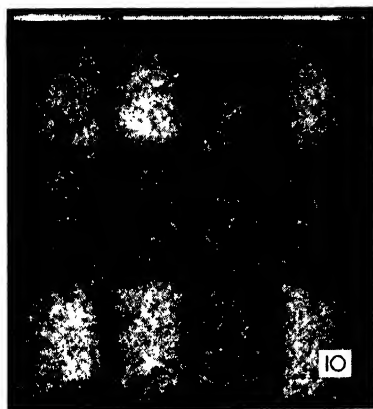
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*Samples of False Packed (Plated) Bales collected by Mr. Fred Taylor in Europe,
a portion of the exhibit referred to on pages 2 and 3.*

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COMMITTEE'S COMMUNICATIONS

RESUMÉ OF MINUTES OF THE MEETING
OF THE

International Cotton Committee

HELD ON TUESDAY, SEPTEMBER 28, 1937, AT 10 a.m., AT THE
OFFICES OF THE SYNDICAT GÉNÉRAL DE L'INDUSTRIE
COTONNIÈRE FRANÇAISE, 20 RUE DES CAPUCINES, PARIS

There were present: Dr. H. van Delden (Germany), President, in the Chair, Mr. W. H. Catterall (England), Senior Vice-President, Comm. A. Tobler (Italy), Junior Vice-President, Messrs. O. Anninger (Austria), R. Brasseur and G. Williams (Belgium), Dr. E. Zucker (Czechoslovakia), Messrs. H. Windfeld-Hansen (Denmark), W. M. Wiggins (England), F. Holroyd, T. Ashurst, W. A. Greenhalgh, W. Heaps and J. Pogson (England), J. Le Blan, R. A. de la Beaumelle (France), Dr. W. Böhm, (Germany), J. Gelderman (Holland), Y. Ito (Japan), C. Jenny (Switzerland), A. Gassner (Yugo-Slavia), H.E. Hussein Bey Enan (Egypt), Mr. F. Taylor, representing the United States Department of Agriculture, Messrs. Huber Ruf and K. Hentschel, representing the International Standards Association and Textilnorm respectively, Arno S. Pearse, Expert Adviser, N. S. Pearse, General Secretary, and J. Pogson, Jr., Assistant Secretary.

THE PROPOSED FORTY HOUR WORKING WEEK CONVENTION IN THE TEXTILE INDUSTRY

Mr. ASHURST and Mr. POGSON gave an account of what transpired at the Conference of the International Labour Organisation, held in Geneva in June last, in connection with this matter. They said

that Employers had naturally expected that, in connection with the proposed convention, they would begin in Geneva where they had finished in Washington. They were surprised, therefore, when the chairman ruled that he was not prepared to allow any discussion upon what had taken place in Washington. Eventually, they were granted four hours' discussion (which actually resolved itself into two, on account of translations).

Mr. ASHURST said that furthermore, the chairman had refused to allow the Employers to debate the preamble to the convention. As no convention could be adopted that would be practical, and none could be devised to work equitably throughout the textile trade, the Employers had declined to vote on any article of the proposed convention, on the grounds that if a convention was not practicable, why discuss it? Owing to what Mr. Ashurst termed unconstitutional action on behalf of the Secretariat of the International Labour Office, the Convention obtained the necessary two-thirds majority, when voted upon by the full conference.

One of the Employers' recommendations in Washington had been the establishment of an International Statistical Sub-Committee for the purpose of obtaining facts and figures bearing upon the whole situation. Now, after having adopted the Convention, the International Labour Office had placed upon the agenda of the forthcoming meeting of the Governing Body in Prague, the establishment of such a sub-committee. The British Employers felt very strongly about the whole situation.

FALSE PACKING IN AMERICAN COTTON

Mr. FRED TAYLOR began by giving a resumé of the work he did last year in collecting evidence of false packed American cotton in Europe. He described how, on the occasion of the holding of two international conferences, in Washington this year and last, he had arranged meetings between the senior officials of the Department of Agriculture, including Mr. H. A. Wallace and Dr. Black, and representatives of the European cotton spinning industry in order that the spinners might have an opportunity of personally acquainting those gentlemen with the nature of their complaints.

Mr. TAYLOR stated that the U.S. Department of Agriculture had sent him upon a tour around the cotton growing South, together with his exhibit of examples of false packed and otherwise unmerchantable bales which he had collected in Europe. Mr. Taylor had given a series of lectures at most of the Southern cotton centres to farmers, ginnermen and shippers, pointing out the harm that was being done not only to the spinners but also the prestige of American cotton by false packed bales. Furthermore, he stated that he had made another tour of United States mills, using the same cotton under similar conditions that the European mills which made complaints had been using. He had found those mills experiencing the same trouble as their European counterparts, although he was of the opinion that there was a greater percentage of complaints on the European side.

However, Mr. Taylor thought that the publicity which this subject had been receiving at the hands of the trade press, especially in the United

States, would go a long way to counteract the trouble. He showed to members of the Committee, photographs of the various component parts of his exhibit, and stated that the reception given by everyone concerned to his work had been most encouraging. He proposed to carry on in the same way this year, and appealed to spinners in Europe for a continuance of the assistance they had rendered to him last year.

Mr. TAYLOR then exhibited a bale marker to the members of the Committee. The marker, he stated, had been designed to enable the bale to be traced back to the ginner. Experiments were at present being made with this marker in order to determine to what extent it would fulfil its purpose. He thought that individual identification of the bale was a good step forward in the matter of eradicating false-packed bales. He also thought that the complaints originated in the obsolete rather than in the modern gins.

Mr. WINDFELD-HANSON desired to know whether anything could be done by the cotton growing states jointly in the way of establishing legislation.

Mr. TAYLOR stated, in reply, that there were difficulties in the way of this being done, under the existing laws. If they could only get the exporting states (Texas, Oklahoma, Arkansas, Mississippi, Louisiana) to come together in this way, it would be an achievement.

The PRESIDENT, on behalf of the Committee, thanked Mr. Taylor for his interesting statement, and thought that his last suggestion concerning the exporting states jointly instituting legislation prohibiting false packed bales was a very good one. He was also in agreement with the photographs of Mr. Taylor's exhibit of false packed bales being reproduced in the INTERNATIONAL COTTON BULLETIN, alongside photographs of bales of "Zellwolle."

The GENERAL SECRETARY stated that the Department of Agriculture was particularly keen to receive reports from spinners who spin bales in which these new bale markers are fitted. He warned spinners to be on the lookout for those markers. He also stated that the marker had been popularly received in America by everyone concerned. There was a general desire to see the bad ginner eliminated.

SISAL

Discussion took place regarding spinners' complaints of sisal being used in the baling of cotton, and on the motion of Mr. Holroyd, the following resolution was unanimously adopted:—

"It is essential that no sisal or any fibre akin to sisal or substance containing sisal, be used in the baling of cotton, either as a covering or as a string. In the opinion of the Committee of the International Federation of Master Cotton Spinners' and Manufacturers' Associations cotton string should be used in place of sisal string."

"Z" AND "S" DEFINITIONS FOR TWIST IN COTTON YARNS

It was unanimously decided to approve the "Z" and "S" definitions of twist in single and doubled cotton and artificial silk (rayon) yarns,

as defined by International Standards Association, subject to the amendments proposed by the German Master Cotton Spinners' Association. The "Z" and "S" definitions will be found on page 7.

STANDARDISATION AND UNIFICATION OF TEXTILE TERMS AND TESTING

On the proposal of Mr. de la Beaumelle, it was unanimously decided that the following gentlemen meet the International Standards Association, but only after the whole matter has been discussed at the Egyptian Congress. This sub-committee would then be better informed of the individual desires of the respective countries, he stated.

Comm. A. Tobler (Italy).

Mr. T. Ashurst (England).

Monsieur R. A. de la Beaumelle (France).

Dr. W. Böhm (Germany).

It was stated that the next meeting of the International Standards Association would be held in June next year.

Mr. CATTERALL asked that all affiliated associations should keep the Head Office informed of the attitude of their respective countries on these matters, and that the General Secretary should keep in touch with the International Standards Association.

THE AGREEMENT REGARDING PRICE FIXING AND REGULATION OF PRODUCTION IN THE AUSTRIAN COTTON INDUSTRY

Mr. ANNINGER submitted the text of an agreement regarding Price Fixing and the Regulation of Production which the Austrian cotton weavers concluded among themselves at the beginning of February this year.

In reply to a question from Mr. de la Beaumelle, Mr. ANNINGER stated that the agreement had not been made compulsory by the State. It was a voluntary undertaking and nearly 98 per cent. of the Austrian manufacturers adhered to it.

The PRESIDENT thanked Mr. Anninger for his very able explanation and instructed the General Secretary to circularise the scheme to affiliated associations with the object of the possible formulation and application of similar schemes in other countries.

FINAL ARRANGEMENTS FOR THE EGYPTIAN COTTON CONGRESS

In order to accommodate certain of the delegates to the Congress whose steamer would not arrive in Alexandria until early in the morning of January 26, 1937, it was decided to ask the Egyptian Organising Committee to postpone the time of the Inaugural Reception until later in the afternoon or early evening of the same day. The meetings of the Joint Egyptian Cotton Committee and the International Cotton Committee

could possibly be held at some other time on the same day, to be arranged later.

H. E. ENAN BEY promised to refer the matter of the postponement of the Inaugural Reception from the morning to the afternoon of January 26 to his Committee, and to let the Head Office know something definite as early as possible. If it should prove impossible to arrange for a postponement, he would arrange for a special train to convey the delegates travelling on the "Esperia" from Alexandria to Cairo.

The GENERAL SECRETARY reported that about two hundred and eighty spinner delegates and ladies had, up to the present, notified the Head Office of their intention to be present.

It was unanimously decided that the Congress, following the one to be held in Egypt next year, should be held in 1940.

ALTERATION IN THE STATISTICAL INQUIRY FORM

Mr. T. ASHURST stated that efforts had been instituted in the manufacturing section of the English cotton industry with a view to bringing spindle capacity more into line with loom capacity. It was the desire of his committee to obtain the number of spindles engaged on the production of twist and weft respectively. By twist he meant warp yarn.

It was decided to instruct the General Secretary to collect the figures required by the English manufacturers' associations in respect of England alone, as a trial measure.

It was unanimously decided, on the proposal of the General Secretary, supported by Dr. Böhm and Mr. Brasscur, to alter the wording in questions 3 and 4 of the statistical questionnaire from "stopped" to "working" in question 3, and from "stopped" to "worked" in question 4. Questions 3 and 4 will in future read as follows:—

3. How many spindles in your mills were *working* during last half-year, and for how many hours?
4. Multiply spindles by hours *worked* to arrive at "spindle-hours."

It was also decided to collect statistics relating to the consumption and stocks of staple fibre on the part of cotton spinning concerns.

GENERAL SECRETARY'S VISIT TO U.S. COTTON BELT

The General Secretary's Report upon his recent visit to the U.S. Cotton Belt was enthusiastically received by the Committee, and the President congratulated him upon its production.

The GENERAL SECRETARY, commenting upon his report, stated that, as the Committee were no doubt aware from the tenor of his report, he had paid special attention on this occasion to the development of cotton growing areas in the irrigated section of the Belt, i.e., California, Arizona, New Mexico and West Texas. He had been prompted to visit these areas on account of the prejudice which some spinners were wont to show against irrigated cotton. He felt bound to state that some

of the cotton he had seen was very good indeed and exhibited some samples to the members of the Committee. He felt certain that there was an important future for irrigated American cotton.

The methods used in California for irrigating cotton had interested him particularly, and he thought that the production in that State would increase greatly. Even now the average yield was well over a bale per acre. He then spoke of the work he had done in addressing a ginners' meeting in Austin, Texas, condemning false packed cotton. The Texas Cotton Ginners' Association had asked him to visit the cotton belt next year and give similar addresses in more detail. The Ginners' Associations were quite aware of the existence of false packed bales and were doing everything they could to stamp out the practice.

METHODS OF TESTING FOR MOISTURE IN COTTON

It was resolved to ask the various Testing Houses in the world to send to the Head Office of the International Federation an account of the method or methods employed for testing cotton for moisture in the respective Testing Houses. These to be circulated to those members of Testing Houses who are attending the meeting of Testing House officials convened in connection with the forthcoming Congress in Cairo and Alexandria, for the purpose of arriving at a uniform method of testing for moisture in raw cotton.

DATE AND PLACE OF NEXT MEETING

It was resolved that the next meeting of the International Cotton Committee should be held in Cairo on January 26, 1938, in connection with the holding of the Egyptian Congress.

A vote of thanks to The PRESIDENT, suitably proposed by Mr. CATTERALL, and carried with acclamation, terminated the meeting.



<i>Z Twist</i>	<i>S Twist</i>
<i>Torsion Z</i>	<i>Torsion S</i>
<i>Drehung Z</i>	<i>Drehung S</i>

DESIGNATION OF TWIST DIRECTION IN SINGLE YARNS AND PLIED YARNS.

(1) The direction of twist in single yarns is designated by the small letters s and z; the direction of twist in doubled yarns by the capital letters S and Z.

(2) All single yarns are designated by z twist, and all doubled yarns by Z twist when the direction of their spirals is parallel with the central portion of the letter Z.

(3) All single yarns are designated by s twist, and all doubled yarns by S twist when the direction of their spirals is parallel with the central portion of the letter S.

(4) The designation of twist direction shall always follow the indication of the numeration of yarn and yarn count.

INDICATION DU SENS DE TORSION POUR LES FILS ET LES RETORS.

(1) Le sens de torsion des fils est indiqué par les lettres minuscules s et z; le sens de torsion des retors par les lettres majuscules S et Z.

(2) Sont avec torsion z tous les fils et avec torsion Z tous les retors dont la torsion est parallèle à la partie centrale de la lettre Z.

(3) Sont avec torsion s tous les fils et avec torsion S tous les retors dont la torsion est parallèle à la partie centrale de la lettre S.

(4) L'indication du sens de torsion doit toujours suivre l'indication du titrage du fil et du nombre des fils.

BEZEICHNUNG DER DREHRICHTUNG VON GARNEN UND ZWIRNEN.

(1) Die Drehrichtung von Garnen wird mit kleinen Buchstaben s und z, die Drehrichtung von Zwirnen mit grossen Buchstaben S und Z bezeichnet.

(2) z—gedreht sind alle Garne, Z gedreht alle Zwirne, deren Drehung bei senkrecht gehaltenem Faden dem Schrägstrich des Buchstabens z parallel ist.

(3) s—gedreht sind alle Garne, S gedreht alle Zwirne, deren Drehung bei senkrecht gehaltenem Faden dem Schrägstrich des Buchstabens S parallel ist.

(4) Die Bezeichnung der Drehrichtung muss immer die Bezeichnung des Titels des Garnes und die Zahl der Garne folgen.

GERMAN COUNTER-PROPOSAL FOR THE WORDING.

(1) The Twist direction of yarns is designed by the small letters "z" and "s," the direction of twist in doubled yarns by the capital letters "Z" and "S."

(2) No counter-proposal.

(3) No counter-proposal.

(4) If yarn number and designation of the twist direction are stated of a yarn or doubled yarn, the yarn number stands first, the designation of the twist direction follows.

DÉSIGNATION DU SENS DE RETORDAGE POUR LES FILS SIMPLES ET DOUBLES.

(1) Le sens de retordage des fils simples est indiqué par les lettres minuscules "z" et "s," et celui des fils doublés par les lettres majuscules "Z" et "S."

(2) Aucune contre-proposition.

(3) Aucune contre-proposition.

(4) Lorsque le numéro du fil simple et l'indication du sens de retordage d'un fil simple ou doublé sont mentionnés, le numéro est indiqué tout d'abord et l'indication du sens de retordage suit.

DEUTSCHER GEGENVORSCHLAG FÜR DEN TEXT.

(1) Die Drehungsrichtung von Garnen wird mit kleinen Buchstaben "z" und "s," die Drehungsrichtung von Zwirnen mit grossen Buchstaben "Z" und "S" bezeichnet.

(2) Kein Gegenvorschlag.

(3) Kein Gegenvorschlag.

(4) Werden bei einem Garn oder Zwirn Garn-nummer und Bezeichnung der Drehungsrichtung angegeben, so steht die Garn-nummer an erster Stelle, die Bezeichnung der Drehungsrichtung dahinter.

PROVISIONAL PROGRAMME

FOR THE

XVIII

International Cotton Congress

CAIRO—ALEXANDRIA

JAN. - FEB. 1938

CAIRO:

WEDNESDAY, January 26th.

- Morning.* (1) Sign Names at Palace.
(2) Joint Egyptian Cotton Committee Meeting with Prime Minister and Minister of Agriculture at Opera before Inauguration.
(3) Official Inauguration : Opera House.
- Afternoon.* Joint Egyptian Cotton Committee Meeting and International Cotton Committee Meeting.
- Evening.* Official Banquet.

THURSDAY, January 27th.

- Morning.* Congress Meeting : Agricultural Museum Fouad I, Doqqi.
- Afternoon.* (1) Visit Cotton Research Board and Spinning Test Mill at Giza.
(2) Tea offered by Ministry of Agriculture.
- Evening.* Free.

FRIDAY, January 28th.

- Morning.* Congress Meeting : Agricultural Museum Fouad I, Doqqi.
- Afternoon.* (1) Congress Meeting Royal Agricultural Society, Ghezireh.
(2) Visit Cotton Museum of Royal Agricultural Society.
(3) Tea offered by Royal Agricultural Society.
- Evening.* Banquet.

SATURDAY, January 29th.

- Morning.* Free.
- Afternoon.* Visit to Pyramids : New Excavations or Sakkara.
- Evening.* Free.

SUNDAY, January 30th.

- Morning.* Visit to Sids : Government Experimental Farm.
- Afternoon.* Visit to Ginning Factory in Upper Egypt and return by Nile Steamer, if possible.
- Evening.* Free.

MONDAY, January 31st.

- Morning.* Congress Meeting : Agricultural Museum Fouad I, Doqqi.
- Afternoon.* Visit to Cairo Museum of Antiquities.
- Evening.* Banquet.

TUESDAY, February 1st.

- Morning.* Meeting of Representatives of Testing Houses.
- Afternoon.* (1) Congress Meeting : Agricultural Museum Fouad I, for submission resolutions.
(2) Visit to Agricultural Museum Fouad I.
(3) Tea offered by Ministry of Agriculture.
- Evening.* Depart for Alexandria.

ALEXANDRIA:**WEDNESDAY, February 2nd.**

- Morning.* Meeting of Congress.
- Afternoon.* Tea.
- Evening.* Free.

THURSDAY, February 3rd.

- Morning.* Visits to Presses—Minet-el-Bassal, Alexandria
Testing House.
- Afternoon.* Meeting of Congress (for Humidity resolutions).
- Evening.* Banquet.

FRIDAY, February 4th.

- Morning.* In Alexandria.
- Afternoon.* Depart for Cairo.
- Evening.* Leave Cairo for Luxor-Aswan.

LUXOR:**SATURDAY, February 5th.**

In Luxor.

SUNDAY, February 6th.

In Luxor.

MONDAY, February 7th.

Leave for Aswan.

ASWAN:**TUESDAY, February 8th.**

In Aswan.

WEDNESDAY, February 9th.

- Morning.* In Aswan.
- Afternoon.* Leave Aswan, arrive Luxor.
- Evening.* Leave Luxor for Cairo.

CAIRO:**THURSDAY, February 10th.**

Morning. Arrive Cairo, leave for Alexandria.

Afternoon. Departure.

N.B.—Members are requested to bring with them their respective decorations.

— — —

XVIII INTERNATIONAL COTTON CONGRESS

CAIRO—ALEXANDRIA, JANUARY AND FEBRUARY, 1938

Attention is drawn on pages 9-12 and 15-27 to the Programme and suggested Itineraries for the forthcoming International Cotton Congress to be held in Cairo and Alexandria in January and February of next year. Intending delegates who have not already done so, are advised to send in their names to their various national associations and to make their travel and hotel reservations without delay, as the Congress will take place at the commencement of the Egyptian season, when accommodation will be taxed to its fullest capacity. Affiliated Associations are requested to forward the names of intending delegates and ladies to the Head Office of the International Cotton Federation as early as possible, and to note that papers for discussion at the Congress should be in the hands of the General Secretary by the end of November at the very latest.

For the benefit of delegates who have not already made their plans, it may be mentioned that all the well-known tourist agencies are fully conversant with all the arrangements made regarding travelling and hotel accommodation and will, upon application, quote delegates all-inclusive prices from their respective countries for itineraries similar to those given on the following pages, which are in respect of England only.

Any further changes in the Congress Programme will be communicated direct to delegates by the Head Office of the International Cotton Federation, as will all other information, papers for discussion, identity cards, etc. It is pointed out that identity cards must be stamped at the Information Bureau in Cairo (the address of which will be sent to delegates at a later date) in order that delegates may take advantage of the reduced fares offered by shipping and railway companies on their return journeys.

Congress Badges will be distributed at the Official Information Office in Cairo, at which delegates should register immediately following their arrival in the City.

Providing sufficient delegates travel by the Egyptian steamer "El Nil" on the outward journey from Marseilles or Genoa to Alexandria, an Information Office, in the charge of a Government official, will be established on the boat.

FACILITIES TO BE GRANTED TO CONGRESS DELEGATES

- (1) Every facility will be given to delegates upon their disembarking at Alexandria, in order to enable them to negotiate the Egyptian Customs with as little delay as possible. In this connection, special luggage labels will be issued in order that the transference of baggage may be expedited.
- (2) Egyptian visas will be issued gratis to all delegates by the Egyptian Consular officials in the various countries.
- (3) The Egyptian Government will grant free railroad conveyance to delegates and their wives in respect of the initial railroad journey from the port of disembarkation to Cairo, and the final journey from Cairo to the port of embarkation. In respect of all other railroad travel by delegates and ladies, whilst they are in Egypt, except the journey from Cairo to the Conference in Alexandria, which is free, a reduction of 50 per cent. will be granted on all Egyptian railways.
- (4) No charge will be made to delegates and ladies visiting either the Museum of Antiquities or any other of the antiquities in Cairo or Upper Egypt. Some idea of the amount of this concession may be gathered from the fact that the ordinary charge of admission to the Museum of Antiquities alone is £2 per person.
- (5) To delegates and members of their families travelling to and from the Congress on the Palestine State railways, a reduction of 50 per cent. will be granted.

HOTEL ACCOMMODATION

The Casino San Stefano Hotel, normally closed during the winter months will be specially opened for the benefit of members of the Congress visiting Alexandria in order to relieve the pressure on the other Hotels in Alexandria, which are as a rule quite heavily booked during the time in question. The Casino San Stefano although not being in Alexandria itself is within easy distance by taxi, bus or tram, and is first class in every way. In view of the special arrangements made by the Proprietors of this hotel, members are invited to bear this establishment in mind when deciding on their Alexandria arrangements, although, naturally, they are free to stay at whichever other establishment they choose if accommodation is obtainable. The charge to be made by the Casino San Stefano Hotel will be £1 per day per person for full board residence.

We draw attention to the fact that the Heliopolis Palace Hotel is now re-offering reduced rates to Congress delegates. Attention is drawn to these on page 25. The Hotel also offers to guests free entrance to Race Course and reduced cut rates at the Heliopolis Sporting Club (Golf—18 holes, Polo, Cricket, Tennis, Swimming, etc.).

ESTIMATED COST OF JOURNEY.

Arrangements have already been made with the hotels in Egypt, certain Continental railways and certain steamship companies for considerable reduction in fares and accommodation.

Steamship fares have been reduced by approximately 50 per cent. to bona fides Congress delegates and members of their families. It is estimated that the cost from London to London, inclusive of all railway travelling, steamship fares and hotel accommodation in Egypt will approximate £90.

For those delegates who do not participate in the Nile excursion to Luxor and Aswan, the cost will be decreased by approximately £15.

Prospective delegates should inform their national Association at the earliest possible date of their intended participation in this Congress, as the Egyptian Organisation Committee is anxious to have some idea of the probable number of delegates.



CAIRO

HELIOPOLIS PALACE HOTEL

The Largest Hotel in Egypt.

350 rooms with private baths. Less than ten minutes from the centre of Cairo, where its guests are conveyed free of charge by Metro. or bus. All indoor attractions—all outdoor sports. Moderate charges. Same management **HELIOPOLIS HOUSE**, first-class Family Hotel. For particulars write to the Manager.

SUGGESTED ITINERARIES FOR THE INTERNATIONAL COTTON CONGRESS EGYPT

JANUARY-FEBRUARY, 1938

Compiled by Messrs. Cox and Kings, 13 Regent Street, Pall Mall, London, S.W.1.
(representing the Mistr Shipping Co.), Joint Official Travel Agents for the Congress

It should be borne in mind that all rates quoted in these itineraries are based on current rates of exchange and are subject to fluctuation.

ITINERARY "A"

(Including Upper Egypt, and travelling by s.s. "EL NIL" in both directions.
All inclusive rate £84 os. od. for the accommodation as specified.

For list of extras see page 18.

Date : January, 1938.

Duration : Thirty days.

JANUARY 18th.	Depart London (Victoria Station) via Dover, Calais, Paris	11-00 a.m.
JANUARY 19th.	Arrive Marseilles Depart s.s. "EL NIL"	7-00 a.m. 1-00 p.m.
JANUARY 20th.	Arrive s.s. "EL NIL," Genoa Depart s.s. "EL NIL," Genoa	7-00 a.m. 1-30 p.m.
JANUARY 24th.	Arrive s.s. "EL NIL," Alexandria Leave by train for Cairo Arrive Cairo.. .. .	5-00 p.m. 7-00 p.m. 10-20 p.m.
	Transfer to hotel.	
JANUARY 25th.	Free in Cairo.	
JANUARY 26th to FEBRUARY 9th.	} As per Official Programme.	
FEBRUARY 10th.		
	Arrive Cairo.. .. . Depart Cairo Arrive Alexandria Depart Alexandria per s.s. "EL NIL"	7-30 a.m. 8-00 a.m. 10-40 a.m. Noon
FEBRUARY 14th.	Arrive Genoa, s.s. "EL NIL"	1-30 p.m.
FEBRUARY 15th.	Arrive Marseilles, s.s. "EL NIL" Depart Marseilles, by train	1-00 p.m. 7-50 p.m.
FEBRUARY 16th.	Arrive London (Victoria Station)	3-21 p.m.

NOTE.—Passengers wishing to join and leave the s.s. "EL NIL" at Genoa, thus saving a day in each direction, can do so at a supplementary charge of £3 os. od.

This Tour covers :—

First-class rails between London and Marseilles, with sleeper accommodation between Paris and Marseilles, in both directions.

All passenger and hand baggage transfers at Dover, Calais, Paris, Marseilles, Alexandria and Cairo.

Meals on trains and Gratuities to Sleeping Car Attendants.

First-class return steamer accommodation on s.s. "EL NIL."

First-class rails and reservations in Egypt.

Hotel accommodation at Continental Hotel, Cairo; and at Alexandria, Luxor and Assuan.

Excursions in Upper Egypt.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers, and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

ITINERARY "B"

(Alexandria and Cairo only, travelling by s.s. "EL NIL" outward and returning by s.s. "MARCO POLO" to Venice.)

All inclusive rate £73 10s. od. for the accommodation as specified.

For list of extras, see page 18.

Date : January, 1938.

Duration : Twenty-three days.

JANUARY 18th.	Depart London (Victoria Station)	11-00 a.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
	Depart s.s. "EL NIL"	1-00 p.m.
JANUARY 20th.	Arrive s.s. "EL NIL," Genoa	7-00 a.m.
	Depart s.s. "EL NIL," Genoa	1-30 p.m.
JANUARY 24th.	Arrive s.s. "EL NIL," Alexandria	5-00 p.m.
	Leave by train for Cairo	7-00 p.m.
	Arrive Cairo	10-20 p.m.
	Transfer to hotel.	
JANUARY 25th.	Free in Cairo.	
JANUARY 26th	} As per Official Programme.	
to		
FEBRUARY 3rd.		
FEBRUARY 4th.	Free in Alexandria.	
FEBRUARY 5th.	Depart by s.s. "MARCO POLO"	2-00 p.m.
FEBRUARY 6th.	At Sea.	
FEBRUARY 7th.	At Sea.	
FEBRUARY 8th.	Arrive Venice	1-00 p.m.
	Depart Venice by Simplon-Orient Express	3-00 p.m.
FEBRUARY 9th.	Arrive London (Victoria Station)	5-20 p.m.

NOTE.—Passengers wishing to join the s.s. "EL NIL" at Genoa can save a day on the outward journey at a supplementary charge of £1 10s. od.

This Tour covers :—

First-class rails between London-Marseilles, and Venice-London, with sleepers in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Marseilles, Alexandria, Cairo, Venice, Boulogne, Folkestone.

Meals on trains and gratuities to Sleeping Car Attendants.

First-class accommodation on s.s. "EL NIL" and s.s. "MARCO POLO."

First-class rails and reservations in Egypt.

Accommodation and meals at Continental Hotel in Cairo, and at Alexandria.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

ITINERARY "C"

(Including Upper Egypt, and travelling by Italian Steamer in both directions.)

All-inclusive rate £87 3s. od. for the accommodation as specified.

For list of extras, see page 18.

Date : January, 1938.

Duration : Twenty-eight days.

JANUARY 21st.	Depart London (Victoria Station)	..	2-00 p.m.
JANUARY 22nd.	Arrive Genoa (Rome Express)	.. ..	1-00 p.m.
	Embark s.s. " ESPERIA "	.. ..	3-00 p.m.
JANUARY 23rd.	At Sea.		
JANUARY 24th.	At Sea.		
JANUARY 25th.	At Sea.		
JANUARY 26th.	Arrive Alexandria	.. ..	7-00 a.m.
	Depart for Cairo	.. ..	7-30 or 9-00 a.m.
	Arrive Cairo	.. ..	10-10 or 12-10 a.m.
JANUARY 26th to FEBRUARY 9th.	} As per Official Programme.		
FEBRUARY 10th.	Free in Cairo or Alexandria.		
FEBRUARY 11th.	Free in Cairo or Alexandria.		
FEBRUARY 12th.	Embark on s.s. " ESPERIA " (Alexandria)		2-00 p.m.
FEBRUARY 13th.	At Sea.		
FEBRUARY 14th.	At Sea.		
FEBRUARY 15th.	At Sea.		
FEBRUARY 16th.	Arrive Genoa	.. ..	8-00 a.m.
	Depart Genoa (Rome Express)	.. ..	6-57 p.m.
FEBRUARY 17th.	Arrive London	.. ..	5-21 p.m.

The above Tour covers :—

First-class return rails between London and Genoa, with sleeping accommodation in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Genoa, Alexandria and Cairo.

Meals on trains and gratuities to Sleeping Car Attendants.

First-class return accommodation on s.s. " ESPERIA."

First-class rails and reservations in Egypt.

Accommodation and meals at Continental Hotel, Cairo ; and at Alexandria, Luxor and Assuan.

Excursions in Upper Egypt.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

ITINERARY "D"

(Alexandria and Cairo only, travelling by s.s. "ESPERIA" outward and s.s. "MARCO POLO" homeward.)

All-inclusive rate £70 7s. od. for the accommodation as specified.

For list of extras, see below.

Date : January, 1938.

Duration : Twenty days.

JANUARY 21st	Depart London (Victoria Station)	..	2-00	p.m.
JANUARY 22nd.	Arrive Genoa (Rome Express)	..	1-00	p.m.
	Embark s.s. "ESPERIA"	..	3-00	p.m.
JANUARY 23rd.	At Sea.			
JANUARY 24th.	At Sea.			
JANUARY 25th.	At Sea.			
JANUARY 26th.	Arrive Alexandria	..	7-00	a.m.
	Depart for Cairo	..	7-30 or 9-0	a.m.
	Arrive Cairo	..	10-10 or 12-10	a.m.
JANUARY 26th to	As per Official Programme.			
FEBRUARY 3rd.				
FEBRUARY 4th.	Free in Alexandria.			
FEBRUARY 5th.	Depart by s.s. "MARCO POLO"	..	2-00	p.m.
FEBRUARY 6th.	At Sea.			
FEBRUARY 7th.	At Sea.			
FEBRUARY 8th.	Arrive Venice	..	1-00	p.m.
	Depart Venice by Simplon-Orient Express		3-00	p.m.
FEBRUARY 9th.	Arrive London (Victoria Station)	..	5-20	p.m.

The above Tour covers :—

First-class rails between London—Genoa—Venice—London, with sleepers in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Genoa, Alexandria, Cairo, Venice, Boulogne and Folkestone.

Meals in trains and gratuities to Sleeping Car Attendants.

First-class accommodation on s.s. "ESPERIA" and s.s. "MARCO POLO."

First-class rails and reservations in Egypt.

Accommodation and meals at Hotel Continental in Cairo and at Alexandria.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers, and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

EXTRAS

STEAMER SUPPLEMENTS.

Single Cabin, "EL NIL"	..	£1	each way
De Luxe—Bath	..	£4	each way
Single and de Luxe Cabin Italian Steamer	..	(To be arranged)	

HOTEL SUPPLEMENTS.

<i>Itineraries "A" and "C."</i>		Double and single rooms per Person		Supplement for private bathroom per room
Continental Hotel and Mena House	..	—		£5 5 0
Shepherd's..	..	£5 5 0		£10 10 0
Semiramis	..	£10 10 0		£21 0 0
<i>Itineraries "B" and "D."</i>				
Continental Hotel and Mena House	..	—		£3 3 0
Shepherd's..	..	£3 3 0		£6 6 0
Semiramis	..	£6 6 0		£12 12 0

These prices are for the whole of the duration of the stay, as set out in the Official Programme.

INTERNATIONAL COTTON CONGRESS

EGYPT - - JAN.- FEB., 1938



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SUGGESTED ITINERARIES
FOR THE
INTERNATIONAL COTTON CONGRESS
EGYPT

JANUARY-FEBRUARY, 1938

(Compiled by Messrs. Thos. Cook & Son Ltd., Joint Official Travel
Agents for the Congress.)

ITINERARY No. 1

Travelling by Misr Line s.s. "EL NIL" and including visit to Upper Egypt.

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo* :	Without Private Bathroom		With Private Bathroom†	
	Single Room	Two-Bedded Room	Single Room	Two-Bedded Room
Continental ..	£84 1 0	£82 18 6	£85 17 0	£84 1 0
Shepherd's ..	£85 17 0	£84 19 0	£89 9 0	£87 13 0
Semiramis ..	£88 14 0	£87 16 0	£93 4 0	£90 19 0

JANUARY 18th.	Depart London (Victoria Station) ..	11-00 a.m.
	via Dover	
	Depart Calais Maritime by Mediterranean	
	Express Train de Luxe ..	2-30 p.m.
JANUARY 19th.	Arrive Marseilles ..	7-00 a.m.
	Depart Marseilles by s.s. "EL NIL" ..	1-00 p.m.
JANUARY 20th.	Call at Genoa. Depart Genoa ..	1-30 p.m.
JANUARY 24th.	Arrive Alexandria ..	5-00 p.m.
	and continue by train to Cairo.	
JANUARY 25th.	At leisure in Cairo.	
JANUARY 26th	{ Attending Congress in accordance with Official Programme (including visit to Upper Egypt)	
to		
FEBRUARY 9th.		
FEBRUARY 10th	Leave Cairo by morning train for Alexan- dria and embark on s.s. "EL NIL" sailing at noon.	
FEBRUARY 14th.	Arrive Genoa ..	1-30 p.m.
FEBRUARY 15th.	Arrive Marseilles ..	1-00 p.m.
	Depart Marseilles (Sleeping Car) ..	7-50 p.m.
FEBRUARY 16th.	Arrive Paris (Lyon) ..	7-25 a.m.
	Transfer to Gare du Nord.	
	Depart Paris (Nord) ..	8-20 a.m.
	via Calais-Dover.	
	Arrive London (Victoria Station) ..	3-21 p.m.

* Rooms at the hotels in Alexandria, Luxor and Aswan will be allotted according to the accommodation available.

† In Cairo only.

ITINERARY No. 1—*continued*

The Rate includes :—

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Marseilles : Cairo-Luxor and return : Marseilles-Paris, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. Sightseeing at Luxor and Aswan.
10. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Embarkation at Genoa : Passengers may embark on s.s. "EL NIL" and disembark at Genoa instead of Marseilles, thus saving a day in each direction. Details of train services and adjustment of fare will be furnished to those preferring this route.

Steamer Accommodation : The fares quoted are based on first class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France and Egypt and bearing an Egyptian visa. Full information will be supplied on application.

ITINERARY No. 2

Travelling to Egypt by Misr Line s.s. "EL NIL" and returning by Italian s.s. "MARCO POLO," Alexandria and Cairo only.

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo* :	Without Private Bathroom		With Private Bathroom†	
	Single Room	Two-Bedded Room	Single Room	Two-Bedded Room
Continental ..	£73 1 0	£74 19 0	£74 17 0	£73 1 0
Shepherd's ..	£75 1 0	£74 3 0	£78 13 0	£76 17 0
Semiramis ..	£78 1 0	£77 3 0	£82 11 0	£80 6 0

* Rooms at the hotels in Alexandria will be allotted according to the accommodation available.

† In Cairo only.

ITINERARY No. 2—*continued*

JANUARY 18th.	Depart London (Victoria Station) ..	11-00 a.m.
	via Dover.	
	Depart Calais Maritime by Mediterranean Express Train de Luxe	2-30 p.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
	Depart Marseilles by s.s. "EL NIL" ..	1-00 p.m.
JANUARY 20th.	Arrive at Genoa	7-00 a.m.
	Depart Genoa	1-30 p.m.
JANUARY 24th.	Arrive Alexandria	5-00 p.m.
	and continue by train to Cairo.	
JANUARY 25th.	At leisure in Cairo.	
JANUARY 26th	} Attending Congress in accordance with Official Programme.	
to		
FEBRUARY 3rd.		
FEBRUARY 4th.	At leisure in Alexandria.	
FEBRUARY 5th.	Depart Alexandria by Adriatica Line s.s. "MARCO POLO."	2-00 p.m.
FEBRUARY 8th.	Arrive Venice	1-00 p.m.
	Depart Venice by Orient-Simplon Express	3-02 p.m.
FEBRUARY 9th.	Arrive Boulogne	1-30 p.m.
	Depart Boulogne	1-50 p.m.
	via Folkestone.	
	Arrive London (Victoria Station) ..	5-20 p.m.

The Rate includes :—

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Marseilles and Venice-Boulogne, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Embarkation at Genoa : Passengers may embark on s.s. "EL NIL" at Genoa instead of Marseilles and thus save one day. Details of train services and adjustment of fare will be furnished to those preferring this route.

Steamer Accommodation : The fares quoted are based on first class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France, Egypt, Italy and Switzerland and bearing an Egyptian visa. Full information will be supplied on application.

ITINERARY No. 3

(Travelling by Adriatica Line s.s. " ESPERIA " and including visit to Upper Egypt.)

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo*		Without Private Bathroom		With Private Bathroom†	
		Single Room	Two-bedded Room	Single Room	Two-bedded Room
Continental	..	£87 11 0	£86 8 0	£89 7 0	£87 11 0
Shepherd's	..	£89 13 0	£88 15 0	£93 5 0	£91 9 0
Semiramis	..	£92 18 0	£92 0 0	£97 8 0	£95 3 0

JANUARY 21st.	Depart London (Victoria Station) via Dover	11-00 a.m.
	Depart Calais Maritime by Rome Express Train de Luxe	2-30 p.m.
JANUARY 22nd.	Arrive Genoa	9-18 a.m.
	Depart Genoa by s.s. " ESPERIA " ..	3-00 p.m.
JANUARY 26th.	Arrive Alexandria and proceed by special train to Cairo	7-00 a.m.
JANUARY 26th. to FEBRUARY 9th.	} Attending Congress in accordance with Official Programme (including visit to Upper Egypt).	
FEBRUARY 10th.		
FEBRUARY 11th.	At leisure in Cairo.	
FEBRUARY 12th.	Proceed by train to Alexandria and leave by s.s. " ESPERIA "	2-00 p.m.
FEBRUARY 16th.	Arrive Genoa	8-00 a.m.
	Depart Genoa by Rome Express Train de Luxe	6-57 p.m.
FEBRUARY 17th.	Arrive Boulogne	1-30 p.m.
	Depart Boulogne via Folkestone ..	1-50 p.m.
	Arrive London (Victoria Station) ..	5-20 p.m.

The Rate includes :—

1. First-class travel tickets. (See footnote " Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Genoa . Cairo-Luxor and return : Genoa-Boulogne, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hote luncheon and dinner and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. Sight-seeing at Luxor and Aswan.
10. General services of Cook/Wagon-Lits uniformed representatives at the principal points en route.

* Rooms at the Hotels in Alexandria, Luxor and Aswan will be allotted according to the accommodation available.

† In Cairo only.

ITINERARY No. 3—continued

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Steamer accommodation : The fares quoted are based on first-class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France, Italy and Egypt, and bearing an Egyptian visa. Full information will be supplied on application.

ITINERARY No. 4

(Travelling by Adriatica Steamers in both directions. Alexandria and Cairo only.)

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo*	Without Private Bathroom		With Private Bathroom†	
	Single Room	Two-bedded Room	Single Room	Two-bedded Room
Continental ..	£70 15 0	£69 18 0	£72 2 0	£70 15 0
Shepherd's ..	£72 6 0	£71 12 0	£75 0 0	£73 13 0
Semiramis ..	£74 12 0	£73 19 0	£78 0 0	£76 6 0

JANUARY 21st.	Depart London (Victoria Station) via Dover	11-00 a.m.
	Depart Calais Maritime by Rome Express Train de Luxe	2-30 p.m.
JANUARY 22nd.	Arrive Genoa	9-18 a.m.
	Depart Genoa by s.s. " ESPERIA " ..	3-00 p.m.
JANUARY 26th.	Arrive Alexandria and proceed by special train to Cairo.	7-00 a.m.
JANUARY 26th to FEBRUARY 3rd.	} Attending Congress in accordance with Official Programme.	
FEBRUARY 4th.		
FEBRUARY 5th.	At leisure in Alexandria. Depart Alexandria by s.s. " MARCO POLO "	2-00 p.m.
FEBRUARY 8th.	Arrive Venice	1-00 p.m.
	Depart Venice by Orient-Simplon Express	3-02 p.m.
FEBRUARY 9th.	Arrive Boulogne	1-30 p.m.
	Depart Boulogne via Folkestone	1-50 p.m.
	Arrive London (Victoria Station)	5-20 p.m.

* Rooms at the Hotels in Alexandria will be allotted according to the accommodation available.

† In Cairo only.

ITINERARY No. 4—continued

The Rate Includes :—

1. First-class travel tickets. (See footnote " Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Genoa and Venice-Boulogne, including gratuities.
4. Meals en route, including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Steamer accommodation : The fares quoted are based on first-class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports: Passengers must be in possession of valid passports with endorsements embracing France, Italy, Egypt and Switzerland, and bearing an Egyptian visa. Full information will be supplied on application.

INTERNATIONAL COTTON CONGRESS—CAIRO

JANUARY 26th—FEBRUARY 10th, 1938.

List of specially reduced terms offered to delegates and members of their families by hotels in Cairo.

NAME OF HOTEL	PRICE OF ROOMS (Inclusive of meals)				PRICE OF ROOMS (Not including meals)				PRICE OF MEALS		
	Single room	Two-bedded room	Single room with bath	Two-bedded room with bath	Single room	Two-bedded room	Single room with bath	Two-bedded room with bath	Break-fast	Lunch	Dinner
	(P.T. per day)	(P.T. per day)	(P.T. per day)	(P.T. per day)	(P.T. per day)	(P.T. per day)	(P.T. per day)	(P.T. per day)			
SEMIRAMIS ... (on the banks of the Nile)	150	280	200	350	70	140	150	250	18	45	50
SHEPHEARD'S (In the city)	120	220	160	280	60	120	100	180	15	40	45
HELIOPOLIS PALACE† (Helipolis Cairo)	100	140	130	160	40	80	70	100	12	35	40
CONTINENTAL (In the city)	100	175	120	200	50	75	70	100	12	30	40
MENA HOUSE* (Near the Pyramids)	100	175	120	200	40	60	60	90	12	30	40
METRO- POLITAN (In the city)	80	150	80	150	40	80	40	80	10	25	25
HELIOPOLIS HOUSE HOTEL†	65	120	75	150	35	60	45	80	10	25	30

*Distance between the Mena House Hotel and Cairo, 15 kilometres. Frequent tramway and hotel bus services. Duration of journey, 25 minutes.

†Ten minutes from centre of Cairo by electric train or hotel bus. Guests conveyed free of charge to Cairo. The £ sterling is equal to P.T. (Piastres) 07·5.

Reductions Granted by Steamship Companies

Name of Co.	Reduction Allowed	Outward Journey		Homeward Journey	
Misr Steamship Co.	50% on gross Winter fares. Also applies to wife and one son or daughter	Dep. Marseilles s.s. "El Nil" ..	19/1/38	Dep. Alexandria s.s. "El Nil" ..	10/2/38
		Dep. Genoa ..	20/1/38	Arr. Genoa ..	14/2/38
		Arr. Alexandria ..	24/1/38	Arr. Marseilles ..	15/2/38
Khedivial Mail Line	As above	Dep. Marseilles ..	11/1/38	Dep. Alexandria ..	16/2/38
		Dep. Genoa ..	12/1/38	Arr. Naples ..	19/2/38
		Dep. Malta ..	—	Arr. Genoa ..	20/2/38
		Arr. Alexandria ..	16/1/38	Arr. Marseilles ..	21/2/38
Adriatica Steamship Co.	As above	Dep. Genoa s.s. "Esperia" ..	22/1/38	Dep. Alexandria s.s. "Esperia" ..	12/2/38
		Arr. Alexandria ..	26/1/38	Arr. Genoa ..	16/2/38
		Dep. Genoa s.s. "Citta di Bari" (via Piraeus/Rhodes) ..	16/1/38	Dep. Alexandria s.s. "Calitea" (via Rhodes/Piraeus) ..	12/2/38
		Arr. Alexandria ..	21/1/38	Arr. Venice/Trieste ..	16/2/38
American Export Line	As above	Dep. New York s.s. "Exeter" ..	4/1/38	Dep. Alexandria s.s. "Excambion" ..	9/2/38
		Dep. Marseilles ..	15/1/38	Arr. Naples ..	13/2/38
		Dep. Naples ..	17/1/38	Arr. Genoa ..	16/2/38
		Arr. Alexandria ..	20/1/38	Arr. Marseilles ..	18/2/38
				Arr. New York ..	2/3/38
Lloyd Triestino	As above	Dep. Genoa s.s. "Victoria" ..	20/1/38	Dep. Port Said s.s. "Biancamano" ..	4/2/38
		Arr. Port Said ..	23/1/38	Arr. Genoa ..	8/2/38
Messageries Maritimes	As above	Dep. Marseilles s.s. "Champollion" ..	18/1/38	Dep. Alexandria s.s. "Mariette Pacha" ..	11/2/38
		Arr. Alexandria ..	22/1/38	Arr. Marseilles ..	15/2/38
Royal Roumanian State Line	40% on gross Winter fares. 30% for wife and adult children	Dep. Constanza ..	17/1/38	Dep. Alexandria ..	8/2/38 or 13/2/38
		Dep. Istanbul ..	18/1/38	Arr. Piraeus ..	10/2/38*
		Dep. Piraeus via Beyrout and Haifa ..	20/1/38	Arr. Istanbul ..	11/2/38
		Arr. Alexandria ..	24/1/38	Arr. Constanza ..	12/2/38
					19/2/38

* Direct

† via Haifa/Beyrout

NOTES.—Reductions only apply if RETURN tickets are taken out in the first place. Return tickets of the Misr Line are available per Messageries Maritimes and return tickets of the Adriatica Co. are available on the Lloyd Triestino Line and vice versa.

The Royal Roumanian State Line require the return portions of their tickets to be stamped by the Congress Authorities in Cairo.

The following are the ordinary single Winter fare rates at present charged by each Steamship Company and are the rates which will be charged delegates for the return fare :—

Misr Steamship Co. From Marseilles to Alexandria	£22	Lloyd Triestino. Genoa to Port Said ..	£30
Khedivial Mail Line. Marseilles to Alexandria and Genoa to Alexandria ..	£22	Messageries Maritimes. Marseilles to Alexandria	£25
A double route as single (extra) ..	£3		
Adriatica Steamship. Genoa to Alexandria ..	£25		
American Export Line. Marseilles to Alexandria	£26	Royal Roumanian State Line. Istanbul to Alexandria ..	£14 8s. Od.
		Piraeus to Alexandria ..	700 francs (French)

ON TO CAIRO & ALEXANDRIA!



18TH INTERNATIONAL COTTON CONGRESS JAN. 26th—FEB. 3rd, 1938

Thos. Cook & Son Ltd., Joint Official Travel Agents for the Congress, have planned special facilities for British Delegates, full details of which will be found on pages 20—25 of this issue.

Delegates and others interested are advised to notify their requirements early at their nearest Cook Office.

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Bridge and Midland Hotel.

Oldham : 110 Yorkshire Street.



AUSTRIA.

COTTON SPINNING

Judging from the statistics available up to the end of August of the current year, the state of trade in the Austrian cotton spinning mills has not undergone any marked change during the last three months. Admittedly sales were low for this particular season, but August showed an increase in the number of orders received, and it is therefore reasonable to expect that there will be no need for any considerable limitation of production. The actual production at 2·7 to 2·8 million kilos per month is fairly stable. Of course, it is not possible to predict the future development of exports, because the trade with Roumania is dependent on various circumstances not under the control of the industry, and because the sales to other countries are by no means assured owing to the unstable factors arising out of the import permit and payments clearing systems. *In the first seven months of 1937 the foreign trade showed the following figures compared with those of 1936 :—*

IMPORTS OF COTTON YARNS IN QUINTALS.

				1937		1936
Grey	..	..	..	6,738	against	9,504
Bleached	..	..	..	1,508	„	1,714
Dyed	..	..	..	2,062	„	1,465
Total	..	..	..	10,308	„	12,683

EXPORTS OF COTTON YARNS IN QUINTALS.

				1937		1936
Grey	..	..	..	76,494	against	72,839
Bleached	..	..	..	2,935	„	2,021
Dyed	..	..	..	680	„	559
Total	..	..	..	80,109	„	75,419

COTTON MANUFACTURING

For cotton weaving the trade statistics are available only up to the second half of June, and they show that up to this date the state of trade has not undergone any marked change. On a four weeks' average about 14,600 to 14,700 eight hour loom shifts have been worked. Against this the orders received during the summer months were unusually small, which must be attributed to the proportionally high total of sales effected

in the preceding period. In the second half of August and beginning of September, sales activity has been very animated, so that production in the weaving mills will continue to remain stable. The following figures show the import and export movements in the first 7 months :—

IMPORTS OF COTTON CLOTHS IN QUINTALS.

		1937		1936
Grey	.. .. .	12,957	against	10,611
Bleached	.. .. .	1,205	„	828
Dyed	.. .. .	948	„	682
Printed	.. .. .	710	„	612
Fancy weaves	.. .. .	798	„	1,113
Total	.. .. .	16,618	„	13,846

EXPORTS IN QUINTALS.

		1937		1936
Grey	.. .. .	361	against	643
Bleached	.. .. .	3,141	„	3,164
Dyed	.. .. .	708	„	389
Printed	.. .. .	1,661	„	1,217
Fancy weaves	.. .. .	1,507	„	1,352
Total	.. .. .	7,378	„	6,765

The total number of workmen at present employed in the cotton spinning and weaving industry is roughly 15,000. No changes of any kind in wage rates have taken place in any of the two industrial groups.

The following is the original German text :—

BAUMWOLLSPINNEREI

Die Beschäftigungslage der österreichischen Baumwollspinnereien hat nach der bis Ende August ds.J. vorliegenden Statistik in den letzten 3 Monaten keine nennenswerte Veränderung erfahren. Der Absatz war allerdings ein saisongemäss äusserst schwacher, doch zeigt sich im August wieder ein Ansteigen des Auftrageinlaufes und es kann somit erwartet werden, dass keine wesentlichen Einschränkungen der Production erforderlich sein werden. Die tatsächliche Erzeugung ist mit ca. 2.7 bis 2.8 Millionen Kg per Monat ziemlich stabil. Allerdings ist es augenblicklich nicht möglich, eine Prognose bezüglich der weiteren Ausgestaltung der Garnausfuhr zu stellen, weil das Geschäft mit Rumänien von zahlreichen seitens der Industrie nicht beeinflussbaren Umständen abhängt und weil der Absatz in anderen Ländern infolge der fortgesetzt schwankenden Praxis bezüglich des Bewilligungs- und Zahlungsverkehres keineswegs gesichert ist. Die Aussenhandelsbewegung in den ersten 7 Monaten des Jahres 1937 zeigt im Vergleiche mit derselben Periode des Jahres 1936 das folgende Ziffernbild :—

STATE OF TRADE REPORTS

EINFUHR VON BAUMWOLLGARNEN IN Q.

				1937		1936
Roh	..	..	..	6,738	gegen	9,504
Gebleicht	..	..	..	1,508	„	1,714
Gefärbt	..	..	..	2,062	„	1,465
Zusammen	..	..	..	10,308	„	12,683

AUSFUHR VON BAUMWOLLGARNEN IN Q.

				1937		1936
Roh	..	..	..	76,494	gegen	72,839
Gebleicht	..	..	..	2,935	„	2,021
Gefärbt	..	..	..	680	„	559
Zusammen	..	..	..	80,109	„	75,419

BAUMWOLLWEBEREI

Für die Webereien liegen die Summierungsergebnisse der Statistik nur bis zur zweiten Hälfte Juni vor und es kann daher nur festgestellt werden, dass bis zu diesem Zeitpunkte die Beschäftigungslage keine nennenswerte Veränderung erfahren hat. Im vierwöchentlichen Durchschnitt wurden ca. 14.600 bis 14.700 Achtstunden-Stuhlschichten geleistet. Dagegen war der Auftragsseingang während der Sommermonate ein ungewöhnlich schwacher, was mit dem verhältnismässig hohen Umfang der vorausgegangenen Vorverkäufe zusammenhängt. In der zweiten Hälfte August und Anfang September war jedoch die Verkaufstätigkeit eine sehr lebhaft, sodass die Beschäftigungslage der Webereien bis auf weiteres stabil bleiben wird. Was die Aussenhandelsbewegung in Baumwollgeweben betrifft, so zeigt dieselbe wieder für die ersten 7 Monate das folgende Ziffernbild:—

EINFUHR VON BAUMWOLLGEWEBEN IN Q.

				1937		1936
Roh	..	..	..	12,957	gegen	10,611
Gebleicht	..	..	..	1,205	„	828
Gefärbt	..	..	..	948	„	682
Bedruckt	..	..	..	710	„	612
Buntgewebt	..	..	..	798	„	1,113
Zusammen	..	..	..	16,618	„	13,846

AUSFUHR IN Q.

				1937		1936
Roh	..	..	..	361	gegen	643
Gebleicht	..	..	..	3,141	„	3,164
Gefärbt	..	..	..	708	„	389
Bedruckt	..	..	..	1,661	„	1,217
Buntgewebt	..	..	..	1,507	„	1,352
Zusammen	..	..	..	7,378	„	6,765

Die Gesamtzahl der in der Baumwollspinn- und Webindustrie derzeit beschäftigten Arbeiter beträgt rund 15.000. Irgendwelche Veränderungen in den Lohnverhältnissen haben sich in keiner der beiden Industriegruppen ergeben.

(Verein der Baumwollspinner und Weber Österreichs)

BELGIUM.

The general tendency of our industry, indicated in our report of July last, continues to make itself manifest. Whilst the activity of those weavers catering for the export market appears to be well maintained, those weavers supplying the home trade are complaining of a persistent falling off in sales. There has resulted from this a corresponding lull in the sales of yarn, and spinners' order-books which had attained record figures at the close of the first quarter of this year, have shown more and more the lack of new orders.

Fortunately, at the present moment, deliveries of yarn are about equal to production, so that one cannot yet complain of a noticeable increase in stocks of yarn on spinners' hands. By reason of the increase in the cost of living, all wages of textile workers will again be raised 2.75 per cent. at the beginning of October. Wages, which were substantially increased on the occasion of the General Strike in June 1936, have already been increased twice by 2.75 per cent. The October increase will bring the total of wage increases granted since the strike to 8.25 per cent. A week's holiday with pay is granted to operatives, amounting to 2 per cent. on the wages paid in a year.

The original report in French runs as follows :—

La tendance générale de notre industrie, signalée dans notre rapport de juillet dernier, continue à se manifester.

Tandis que l'activité des tissages-exportateurs semble se maintenir, les tisseurs travaillant pour le pays se plaignent du ralentissement persistant des ventes.

Il en résulte une régression analogue pour les ventes de filés et le carnet d'ordres des filateurs, qui avait atteint un chiffre-record à la fin du premier trimestre de cette année, se dégarrit progressivement.

Jusqu'à présent, heureusement, les livraisons de filés équilibrent à peu près la production, de sorte que l'on n'a pas encore à déplorer un accroissement sensible des stocks de fils en filature.

A la suite de la hausse du coût de la vie, tous les salaires des ouvriers textiles seront à nouveau augmentés de 2.75% au début d'octobre. Les salaires, qui avaient été sérieusement augmentés lors de la grève générale de juin 1936, ont déjà été augmentés deux fois, de 2.75%. La majoration d'octobre portera à 8.25% le taux des augmentations accordées depuis la grève.

CHINA.

Hostilities in China have resulted in a sharp curtailment of mill operations. Practically all Shanghai mills have been closed since August 14. All T'singtao mills are closed, and only a few Tientsin mills

are now operating. Interior mills representing about one-third of the country's mill capacity however, are continuing normal operations.

About two-thirds of the Shanghai mills and most of the cotton warehouses are in zones in which fighting has taken place, and heavy destruction has been reported. Arrivals of domestic cotton and imports of foreign staple at Shanghai have been practically nil during the past 6 weeks. The Shanghai futures market has been closed since August 14, and there has been practically no spot trading since that date.

(Foreign Crops and Markets)

CZECHO-SLOVAKIA.

The degree of occupation in the fine spinning section in Czecho-Slovakia, as compared with the first half of the year, has decreased considerably and amounts to about 80 per cent. of full capacity. The demand for yarns has been poor in view of the uncertain cotton market. For these reasons the amount of orders to cotton spinners has decreased.

Yarn prices have fallen approximately in the same proportion as did the price for raw cotton.

The imports and exports for the second quarter of 1937 are shown in the tabulation in the following original report in German :—

Im Nachstehenden erlauben wir uns Ihnen den gewünschten Bericht über das II. Quartal 1937 zu überreichen :

Der Beschäftigungsgrad der Feinspinnereien ist gegenüber dem ersten Halbjahr ziemlich stark zurückgegangen und belief sich um etwa 80% der vollen Kapazität. Die Nachfrage nach Garren war, im Hinblick auf die unsicheren Baumwollmärkte, schwach. Daher sind auch die Orderbestände in den Spinnereien gesunken.

Die Garnpreise erniedrigten sich im ungefähr gleichen Verhältnisse, wie die Baumwollpreise.

Die Entwicklung des Aussenhandels zeigen die folgenden Daten :—

				II Quartal (Second quarter)	
				1937	1936
Einfuhr (Imports) :				q.	q.
Baumwollgarne (Cotton yarns)	..	..	..	7,527	3,980
Baumwollwaren (Cotton goods)	..	..	..	8,794	3,353
Zusammen (Total)	..	..	..	16,321	7,333
Ausfuhr (Exports) :					
Baumwollgarne (Cotton yarns)	..	..	..	36,430	36,006
Baumwollwaren (Cotton goods)	..	..	..	27,005	19,154
Zusammen (Total)	..	..	..	63,435	55,160

(Hospodarsky Svaz Csl. Pradelen Bavlňy)

DENMARK.

The mills have found that orders have slackened off, due to very heavy imports and the mills have been very slack during the summer. It seems as if a slight improvement has set in. Generally speaking, the condition of our industry is not as good as it was twelve months ago. The mills are operating at 20 per cent. lower capacity than a year ago. A week's holiday with full pay is granted to operatives.

ENGLAND.

SPINNING SECTION

The state of trade in the spinning section of the English cotton industry, is almost the same as that reported in July last. It is at present working at over 90 per cent. of full capacity. Due to the uncertain position of the raw cotton situation and other causes there has, of late, been a scarcity of fresh orders. A Government Committee is at present inquiring into the question of holidays with pay, before whom the textile industry will tender evidence at an early date.

MANUFACTURING SECTION

During the early part of the year, the cotton manufacturing section experienced a period of brisk demand, no doubt to some extent in sympathy with the general improvement in trade, and rising prices. Many firms booked substantial orders, and in consequence good time was worked, the activity figure for the section rising to nearly 90 per cent. for the June quarter.

In the summer, however, demand fell away considerably, influenced by sagging raw cotton prices which caused buyers to be reluctant to place orders on a large scale. This fact, whilst not immediately reflected by a decrease in activity, has given rise to apprehension as to the future position. At present, there is no definite indication that the minor boom period will continue for any length of time. The unsettled political position in Europe and the Far East has undoubtedly exercised a very adverse influence upon trade, and the continuation of fluctuation in raw cotton prices has caused loss of confidence.

Although cloth production has been comparatively high during the last half-year, it is disquieting to note that the decline in the export trade has not been arrested, most of the improvement having come from the home market. Prices, both at home and abroad, whilst better than last year, have been by no means adequate, and the manufacturing section has not profited to the same extent as the spinning section from the better trade. In brief, manufacturers have appreciated the briskness in trade, but the order-book position makes the immediate future seem rather ominous unless more settled conditions are found and there is a renewal of confidence amongst buyers.

FRANCE.

As was indicated in the last issue of the "International Cotton Bulletin," diminution in consumption became gradually more marked between March and July of this year. In June the situation had become very bad and there were prospects of the various cotton districts in France having to return to organised short-time working.

Since then, new depreciations in the franc have occurred, the first in June, the second in September, and it is not yet possible to determine what effects the repercussion of these depreciations will have upon the industrial situation. If on the one hand they have given rise to some slight activity in some sections of industry, it would appear on the other hand that they have had but little effect on the general flow of business in other sections.

Having regard to the machinery still completely stopped and to the partial short-time which for one reason or another has been operated by the mills which are working, the degree of occupation in the mills, calculated on the basis of the 40 hour working week, could be estimated, in July, at about 90 per cent. for the spinning section, and at 87.8 per cent. in the case of the weaving section, percentages which have since been slightly reduced.

During the course of the period under review, increases in wages varying from 4 to 8 or 9 per cent. have been granted in Normandy and also in the central and eastern cotton districts of France.

The original French text runs as follows :—

Ainsi que nous l'indiquions dans le précédent Bulletin, un recul de plus en plus accentué de la consommation s'est produit de Mars à Juillet. En Juin, la situation était redevenue franchement mauvaise et l'on envisageait dans les diverses régions cotonnières françaises le retour à des mesures généralisées de short-time.

Depuis lors sont intervenues, fin Juin d'abord puis en Septembre, de nouvelles dépréciations du franc, dont les répercussions sur la situation industrielle ne peuvent être encore appréciées. Si, en effet, elles ont rendu un peu d'activité à certains éléments de l'industrie, il semble qu'elles n'aient guère exercé d'influence sur le mouvement des affaires dans d'autres secteurs.

Compte tenu de l'outillage encore complètement arrêté et du chômage partiel, qui pour une raison quelconque a été pratiqué par les établissements en activité, le pourcentage d'occupation des usines, sur la base de la semaine de 40 heures, pouvait être évalué, en Juillet, à environ 90% pour la filature, et à 87,8% pour le tissage, pourcentages qui ont dû subir depuis une légère diminution.

Au cours du trimestre en revue, des augmentations de salaires variant de 4 à 8 ou 9% ont été réalisées en Normandie, dans la région du centre et dans les régions cotonnières de l'est.

(Syndicat Général de l'Industrie Cotonnière Française)

IMPORTATIONS ET EXPORTATIONS.

IMPORTS AND EXPORTS

						Deuxième trimestre Second quarter	
						1936	1937
						Quintaux	Métriques
						(In metric quintals)	
A—Importations : (<i>Imports</i>)							
1.	Fils de coton					1,546	4,640
	(<i>Cotton Yarn</i>)						
2.	Tissus de coton					2,234	4,980
	(<i>Cotton Piecegoods</i>)						
B—Exportations : (<i>Exports</i>)							
1.	Fils de coton : Exportations totales ..					15,062	17,171
	(<i>Cotton Yarn—Total Exports</i>)						
Destinations : (<i>Countries of Destination</i>)							
	Algérie, Colonies et Pays de Protectorat ..					5,344	5,271
	(<i>Algeria, Colonies and Protectorates</i>)						
	Marchés étrangers					9,718	11,900
	(<i>Foreign markets</i>)						
2.	Tissus de coton : Exportations totales ..					86,189	82,909
	(<i>Cotton Piecegoods—Total Exports</i>)						
Destinations : (<i>Countries of Destination</i>)							
	Algérie, Colonies et Pays de Protectorat ..					79,490	75,146
	(<i>Algeria, Colonies and Protectorates</i>)						
	Marchés étrangers					6,699	7,763
	(<i>Foreign markets</i>)						

GERMANY.

SPINNING SECTION

The amount of orders and deliveries of yarns in the third quarter remained nearly the same as in the previous quarters of the year. There was especially a strong demand on the part of the hosiery trade.

The use of staple fibre (Zellwolle) has made further important progress.

Apart from the workers' holidays the degree of activity of the spinning mills was unchanged.

The original text in German runs as follows :—

Die Höhe des Auftragseinganges und des Versands an Garnen blieb im 3. Vierteljahr ungefähr dieselbe als in den vorhergehenden Quartalen

des laufenden Jahres. Eine starke Nachfrage nach Garnen machte sich insbesondere aus der Wirkerei- und Strickerei-Industrie bemerkbar.

Die Verwendung von Zellwolle hat neue bedeutende Fortschritte gemacht. Der Beschäftigungsgrad der Spinnereien war, abgesehen von der Verminderung durch Arbeiterferien, unverändert.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

MANUFACTURING SECTION

The decrease in orders which began in the latter half of the second quarter of the year, continued generally during the whole of the third quarter. Although the deliveries called for on existing contracts from previous months remained favourable the degree of activity was to some extent lower than before, due partly to the workers' holidays.

The following is the original report in German :—

Die Verringerung des Auftragseingangs, die in der zweiten Hälfte des II. Quartals 1937 begonnen hatte, dauerte im allgemeinen während des ganzen III. Quartals an. Wenn auch die Abrufe auf laufende Kontrakte aus früheren Monaten günstig blieben, so war der Beschäftigungsgrad der Webereien doch etwas geringer als vorher, was zum Teil auch auf den Arbeiterurlaub zurückzuführen ist.

HOLLAND.

SPINNING SECTION

Conditions in the spinning section of the trade are still fairly good. Most spinners are well employed and although not many new orders are coming in the majority of the spinning mills are still working full time. The prospects are rather uncertain as buyers generally prefer to await developments on the cotton market.

WEAVING SECTION

The demand from the home-trade market during this season has been disappointing up to now. Most dealers have large stocks of manufactured goods and do not want to add to their engagements at present. The exports to those markets where quotas for Dutch goods exist have up to now been quite satisfactory. Some of these markets, however, show signs of increasing stocks and it is generally expected that, for the coming season, the amount of orders booked will show a decrease as compared with last year. Most weaving mills are still fairly well engaged, but it is doubtful if the present state of employment can be maintained.

HUNGARY.

The situation in the Hungarian cotton industry during the last few months has remained practically unchanged.

The following is an extract from the statistics of imports and exports for the first half of 1937 :—

				quintals
Imports :	Raw cotton	..	..	133,700
	Cotton yarn	..	..	5,720
	Cotton goods	..	..	3,570
Exports :	Cotton yarn	..	..	120
	Cotton goods	..	..	7,730

Practically the whole of the export falls under the heading of printed materials.

The following is the original report in German :—

Die Lage der ungarischen baumwollverarbeitenden Industrie hat sich im Laufe der letzten Monaten wesentlich nicht verändert.

Die wichtigsten Daten des Aussenhandels in der ersten Hälfte des Jahres 1937 sind die folgenden :—

				quintals
Einfuhr :	Rohe Baumwolle	..	..	133,700
	Baumwollgarne	..	..	5,720
	Baumwollgewebe	..	..	3,570
Ausfuhr :	Baumwollgarne	..	..	120
	Baumwollgewebe	..	..	7,730

Der überwiegende Teil der Ausfuhr entfällt auf bedruckte Gewebe.
(*Magyar Textilgyárosok Országos Egyesülete*)

ITALY.

The state of trade in Italy has changed but little since the reports presented to the Amsterdam meeting of the Committee in May last. If anything, there has been a slight improvement. Paid holidays were granted many years ago, amounting to an increase on the wage bill of 2 per cent.

The following are index numbers representing activity in the Italian cotton industry during recent years. The year 1928 is taken as the basic year, i.e., 100 :—

COTTON SPINNING

	Jan.	Feb.	Mch.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Monthly Average
1935 ..	86.0	85.0	86.5	86.2	85.3	92.8	84.7	72.8	86.0	85.6	85.6	77.0	84.5
1936 ..	77.5	79.6	78.2	72.4	75.0	67.9	58.9	43.7	63.0	66.5	71.5	80.2	69.5
1937 ..	81.9	88.8	92.0	95.1	98.6	98.7	95.3						

COTTON MANUFACTURING

	Jan.	Feb.	Mch.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Monthly Average
1935 ..	77.2	79.4	84.4	85.8	87.9	89.8	85.3	76.1	90.0	90.1	86.0	77.0	84.1
1936 ..	79.1	80.1	82.0	77.7	80.2	77.3	73.5	58.5	70.4	75.6	77.3	76.8	75.7
1937 ..	79.4	87.8	93.9	94.1	70.6	97.8	96.0						

JAPAN.

The prices of Japanese cotton yarns and cloths, have been increasing, contrary to the general tendency elsewhere, due to certain control which the Japanese Government has taken over forward-buying of cotton. The mills will have no free hand in buying operations for the time being, and it is likely to affect the cost of production. The mills have already sold their output to the end of the year, but business after that is only being done to a very limited extent, as they are not quite clear as to their cotton position. Any shortage of cotton is expected to be covered by staple fibre, the production of which is over two hundred tons per day. The export of cotton goods is decreasing.

The following decisions were arrived at by the Japan Cotton Spinners' Association at the meeting of their Committee on July 5, 1937.

- (a) Idle spindles are to be allowed to be utilized for the purpose of spinning staple fibre yarn.
- (b) This decision is to be enforced on and after September 1, 1937.
- (c) Up to half of the idle spindles may be utilized for the spinning of staple fibre yarn for the time being. (End of this year.)

There are about 3,000,000 idle spindles—therefore, half this number of spindles will be available for the spinning of staple fibre yarn. The Staple Fibre Spinners' Association has been formed by trade firms interested in the same.

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS :

May 17—June 13, 1937	..	..	99.38%	of full time production (48 hours)
June 14—July 11, „	..	..	90.56%	„ „ „ „
July 12—Aug. 8, „	..	..	109.87%	„ „ „ „
Aug. 9—Sept. 5, „	..	..	120.04%	„ „ „ „

EXPORTS :

	Cotton Yarn		Piecegoods		Clothing
	value	weight	value	weight	weight
	zl	kg.	zl	kg.	kg.
June, 1937..	..	—	653·874	159·648	114·955
July, „	—	966·011	196·699	65·127
August, „	—	971·680	255·687	51·680

(Zrzeszenie Producentów Przedzdy Bawelnianej w Polsce)

SWITZERLAND.

As a result of old orders, the cotton industry has been able to keep up a degree of activity amounting to about 95 per cent. of full time working. On the other hand, the sharp decline in cotton prices has reduced the number of orders on hand which is very unfavourable for future business.

A number of wage increases have taken place in several firms during the last quarter.

The following is the original report in German :—

Dank alter Orderbestände konnte in der ganzen Baumwollindustrie ein Beschäftigungsgrad von durchschnittlich 95% der vollen Arbeitszeit eingehalten werden, dagegen hat die scharfe Baumwollbaisse die Nachfrage ins Stocken gebracht, was sehr ungünstige Zukunftsaussichten eröffnet.

Die bereits früher erwähnten Lohnerhöhungen wurden im Berichtsquartal von einer Reihe weiterer Betriebe übernommen.

(Schweizerischer Spinner-Zwirner- und Weber-Verein)

U.S.A.

The monthly report of the Census Bureau shows that the consumption of lint cotton by domestic mills in September amounted to 602,000 bales, against 604,000 bales in August and 630,000 bales in September last year. Exports for the month are returned at 617,000 bales, excluding linters, against 220,000 bales in August and 570,000 bales in September last year. Stocks in the hands of manufacturers amount to 991,000 bales, against 961,000 bales last month and 849,000 bales in the corresponding month last year, and in outside warehouses to 6,926,000 bales, against 3,504,000 bales and 6,806,000 bales. Spindles active during the month of September totalled 23,887,000, against 24,353,000 in August and 23,514,000 in September last year. Linters consumption during September was 74,000 bales, against 68,000 bales last year. Stocks at mills amount to 170,000 bales, and in outside warehouses to 52,000 bales, against 132,000 bales and 32,000 bales respectively a year ago.

YUGO-SLAVIA.

Little change has occurred in the cotton spinning section of late. Demand has shown a falling off as a result of the slump in cotton prices. In the weaving section, there has also been a diminution in the demand on account of overproduction and a large volume of imports from countries with manipulated currencies. Holidays with pay are not granted to operatives in Yugo-Slavia.

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ALGERIA.

Growth was at first hindered by the cold spring but subsequently developed, thanks to the dry summer. The crop was then severely attacked by bollworm (*Earias*), which caused damage that cannot yet be estimated.

(International Institute of Agriculture)

ARGENTINA.

The fourth estimate of the 1936-37 cotton crop in Argentina has now been issued by the Ministry of Agriculture, showing that the drought has caused still further reduction in the estimated output for this season at 146,000 bales of 484 lbs. net. It will be recalled that the first estimate issued on 5th March last was 350,000 bales, the second estimate issued on 5th May showed a reduction to 240,000 bales, and the third estimate of 6th July was still lower at 189,000 bales. Total production of the 1935-36 crop was 367,000 bales.

(Bank of London & South America)

BRAZIL (Sao Paulo).

Due to the pronounced fall in cotton prices and the damage done to the Brazilian crop this season by pests and rains, rumours have been current that the acreage sown for cotton for the 1938 crop in this State would be restricted. According to reliable Press reports, however, the demand for seed is as heavy up to date as it was at this time last year. The newspaper comment refers to the cotton subsidy measures to be taken in the United States, and urges that Brazilian planters should not extend their acreage under cotton, but should direct their energies towards maintaining the present position by growing cotton saleable at competitive prices under the new world market conditions which may eventuate.

According to a statement made by the Director of the Classification Service, out of 1,000,000 bales of the 1936-37 Paulista cotton crop handled by his Department there had been requests for reclassification of only 15,216 bales, of which 8,832 bales remained unchanged whilst 3,401 bales were reclassified as being of a higher type and 2,983 bales were modified to a lower type. The Director said that this result, coupled with the very few complaints received from overseas buyers, showed that the cotton classification services in the State of Sao Paulo were up to the standard

of those in other countries, and that certain Press criticism was not justified.

It is estimated that, during the first eight months of this year, 120,000 tons of clean cotton, valued at about 550,000 contos, had been shipped from the Port of Santos. In the same period, exports of cake, oil, linters and other cotton by-products totalled 131,365 metric tons, worth 88,482 contos. Assuming that shipments during the remaining four months of the year will be from 20,000 to 30,000 tons of cotton and, say, 50,000 tons of by-products, it is calculated that the aggregate value of cotton staple and by-products exported from Santos will be not less than 820,000 contos for the full year.

(*Bank of London & South America*)

The quantity of cotton of the 1937 Paulista crop classified up to September 22, totalled 190,451 metric tons, of which the satisfactory proportion of approximately 70 per cent. was for export. Figures published in the Press indicate that there is a much greater demand from abroad for cotton of the higher grades, i.e., type 5 and upwards, than for the inferior qualities and, in consequence, large stocks of the latter are said to be accumulating in Sao Paulo. It has been affirmed that there are overseas buyers for all the cotton produced in this State this season, but this statement requires qualification, since the very low grades can be sold only at prices well below the cost of production.

The price of Sao Paulo type 5 cotton is now Rs. 48\$500 per *arroba* of 15 kilos, which compares with Rs. 50\$000 a month ago, and Rs. 59\$000 early in July.

(*Bank of London & South America*)

CHILE.

MEMORANDUM ON COTTON GROWING IN THE PROVINCE OF TARAPACA, CHILE

The following memorandum was forwarded to the Department of Overseas Trade by the Commercial Secretary to the British Embassy at Santiago, and is based on information supplied by the Vice-Consul at Iquique and the Acting Vice-Consul at Arica.

An article which appeared in the publication *Industria*, implied that the area under cotton cultivation had been increased slightly to about 400 hectares, and that the Government was vaguely hoping to increase this eventually to about 5,000 hectares with an average annual yield of 100,000 quintals of cotton. The actual position is reported to be as follows:—

The ground now cultivated for cotton is estimated at about 400 hectares, located chiefly in the valleys of Lluta and Azapa, which fall within the hinterland of Arica. In 1935 and 1936 preference was given to the growth of Tanguis cotton, originally brought from Peru, and, in a small measure, to "Algodon (cotton) arboreo." Production in the Department of Arica during the last two years was as follows:—

1935				1936			
		Kilos	Value in pesos			Kilos	Value in pesos
Ginned cotton	.. ..	30,269	272,421			33,833	304,497
Raw cotton	.. ..	—	—			23,811	61,909
Cotton seed	.. ..	60,500	18,150			73,360	44,016

It is considered that the cultivation of this cotton may well be increased since cotton grows favourably in the two principal Arica valleys, and the farmers are now able, with their experience, to give better care to the crops. There is hope of increasing the cultivated areas to 3,000 hectares, capable of yielding 60,000 quintals of seed cotton, but a great deal depends upon a promise of the Government to create a system of irrigation. There is no indication as yet of any direct financial assistance to be afforded by the Government, but the farmers could now secure accommodation from the officially subsidised "Caja Agraria" (Farmer's Credit Bank) which now maintains a representative in the town of Arica.

Further south in the Iquique area, experiments in cotton cultivation are being conducted under the auspices of the local State Agriculture Director with, it is alleged, an advance of some 300,000 pesos from the Instituto de Fomento Minero e Industrial de Tarapaca (a semi-Government organisation). In the valley of Camarones, about 5 hectares are under cultivation, but this development has suffered from an outbreak of "Terciana" which so afflicted the labourers and their families that those who had been brought from the south have had to be sent back. Trials are also being made in the Pampa de Tamarugal and the Quebrada de Tarapaca, but Señor Brenner, who has conducted the experiment in the Tarapaca valley, considers that neither the soil nor the climate are suitable for cotton growing. However, it has not been finally determined whether these locations are worth perseverance.

Similar experiments were made five years ago in the Tamarugal Pampa and the Pica oasis, but they were not considered a success.

Cotton production in Chile is still in an experimental stage, being grown only in the extreme northern part in the Department of Arica. Production in 1933 was estimated at about 40,000 pounds and in 1934 at approximately 22,000 pounds from about 250 acres planted to cotton. The area planted in 1936 is estimated at about 1,000 acres. Cotton is planted about November.

(Textile Raw Materials)

CHINA.

China's 1937 cotton crop is expected to be considerably above last year's record crop. The China Cotton Statistical Association estimates that the current year's acreage for all China exceeds that of last year by about 20 per cent. On the basis of August 10 conditions, the Association estimates 1937 production at 4,335,000 bales of 500 pounds, as against their estimate of 3,741,000 bales for last year. The increase over 1936 is primarily the result of acreage expansion in North China. Weather conditions, however, in North China have been unfavourable

recently, with excessive rainfall in some important districts. It is expected that some decrease in estimated production for that area will result from crop damage. In the Yangtze Valley, weather conditions have been generally favourable and the cotton harvest is reported to be progressing satisfactorily.

(U.S. Dept. of Agriculture)

COSTA RICA.

In connection with the proposal to grow cotton in Costa Rica, six Japanese families arrived at San Jose on August 4. They are said to have come from Peru. According to the report, these families represent higher type farmers and it is not intended that they remain permanently in Costa Rica but that they act as supervisors to instruct Costa Rican farmers in cotton growing. However, farming sites have not yet been determined.

(Textile Raw Materials)

ECUADOR.

The cotton crop of 1936 was estimated at about 13,000 bales and the 1937 crop is placed at about the same figure, although it is too early this season for a definite estimate. The cotton picking season in Ecuador is from July to December. As a rule, cotton is delivered from the farm to the ginnery and from there to the mill; therefore, stocks are not kept in warehouses.

(Textile Raw Materials)

GREECE.

A recent decree passed by the Greek Government states that articles produced from domestic cotton will be preferred for supplies for the State, municipalities, and other public bodies, even although the prices at which the local goods are offered are higher than foreign quotations by 35 per cent.

In the middle of August crop condition was generally very satisfactory save in some places where rains were required. Unit-yields were fairly large.

According to the most recent estimate, area cultivated to cotton this year is about 174,600 acres against 154,100 in 1936 and 73,800 on the average of the five years ending 1935; percentages, 113.3 and 236.6. The corresponding production of ginned cotton is estimated at about 469,100 centals (98,100 bales) against 279,000 (58,400) and 145,900 (30,500); percentages 168.1 and 321.6.

(International Institute of Agriculture)

The Greek Agricultural Bank has taken steps to arrest the fall in the price of raw cotton due to panic sales by the producers, namely, by instructing its branches in the cotton-growing districts to grant loans on cotton up to 94 per cent. of the day's quotation, on the understanding

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that all unnecessary formalities are dispensed with. The branches are also to inform one another the quotations for their district in order to give the cotton producers the opportunity of obtaining the best prices.
(*Textile Weekly*)

GUATEMALA.

The cotton crop of 1936-37 is estimated at about 1,000 equivalent bales of 500 pounds, which was purchased by the two cotton mills. While small quantities of local cotton were used for mattresses, practically the whole cotton crop is consumed by the two Guatemalan cotton mills. It is said that the acreage for the 1937-38 crop is considerably larger than that planted in 1936-37. Guatemala cotton is usually marketed between the middle of December and the end of February. For the 1937-38 season, as for the previous season, the cotton mills in Guatemala offered to purchase the whole crop of seed cotton delivered at any railway station in the Republic; they also offered free cotton seed for planting.

Although a larger cotton crop is expected for 1937-38, it is said that no decline in cotton imports is likely, owing to the fact that another cotton mill is planning to begin operation in September of this year.
(*Textile Raw Materials*)

ITALY.

The final figures issued by the Italian Cotton Institute in respect of the area placed under cotton this year show that this is more than double that of 1936, namely 23,000 hectares of which 18,000 hectares are in Sicily alone. Careful preliminary work was carried out by the Cotton Institute, in close consultation with the agricultural organisations, to ensure that only high-grade seeds were used, providing cotton suitable for the actual requirements of the Italian cotton industry. Producers have been guaranteed minimum prices, to which incidentally the increase in cotton growing is thought to be primarily due.

The area planted in 1937 is placed at 22,000 hectares (of 2.471 acres each), according to official sources. Of the total, 17,000 hectares were planted in Sicily, the rest being in southern Italy. The acreage in 1937 is more than double that of 1936. The first shipment of cotton from Ethiopia, said to amount to about 100 tons, was unloaded at Genoa on June 16. The Ethiopian Cotton Company has increased its capital from 2,000,000 to 14,000,000 lire.
(*Textile Raw Materials*)

MANCHURIA.

Cotton acreage in Manchuria this season is estimated at 10 per cent. above that of 1936, according to a report published recently by the U.S. Dept. of Agriculture. The area for last year was reported at

200,000 acres, compared with 166,000 as the average for the three years, 1933-1935. With favourable climatic conditions, the 1937 crop is expected to reach about 85,000 bales (478 pounds net) compared with 67,000 bales produced last season and 56,000 as the average for 1933-1935.

A 20-year cotton programme was launched by the new government in Manchuria in 1933, with a view to expanding plantings until they reached 735,000 acres by 1950. The plan anticipated a crop by 1950 of approximately 415,000 bales of lint, which would be equivalent to a yield of about 270 pounds per acre. During the four years, 1933-1936, since the inauguration of the expansion programme, the yield has averaged only 161.6 pounds of lint per acre. During the same period, the yield in the United States has averaged 192.1 pounds.

Because of unfavourable weather in Manchuria during recent years, farmers have not secured large enough returns from cotton to change extensively from other crops to cotton. Some authorities in Manchuria believe that it is undesirable to attempt to expand cotton acreage rapidly until further experimental work has been carried on for at least four or five years to acclimatise successfully suitable varieties and strains.

PARAGUAY.

In the region between Villarrica and Ascuncion, which is one of the most important zones, planting is delayed for want of rain. The sudden fall in prices had affected particularly the smaller growers, but suggestions that Government aid should be granted in the form of elimination of the exchange expropriation have not been adopted.

(Bank of London and South America)

PORTUGUESE WEST AFRICA.

Cotton production in Angola for 1936-37 is placed at about 10,000 metric tons of seed cotton, equivalent to about 3,000 tons of lint. While no estimates of the 1935-36 crop are available, the exports during that year amounted to 1,577 tons, which represents approximately the total crop since practically all cotton is exported from the colony.

(Textile Raw Materials)

TANGANYIKA.

Planting continued in Arusha to the end of May. Record plantings were made in Moshi.

In Tanga Province a very good crop was expected. In the Rufizi district extensive flood-land cotton planting was taking place, and in the Eastern Province as a whole the crop was very promising.

In the Mavanza district (Lake Province) picking was begun. In the Kwimba district of the same province early cotton and that in low-lying districts was damaged by very heavy rain. In some parts of the Southern Province on the other hand, late-planted cotton was badly in need of rain.

(International Institute of Agriculture)

TURKEY.

The area planted to cotton in 1936 amounted to 254,000 hectares, an increase of 35 per cent. over 1935. The crop, however, was most disappointing on account of heavy insect damage in the Adana District. Final trade estimates place the total Turkish cotton crop of 1936 at 195,000 bales (of about 440 pounds), against 260,000 in 1935. Prices were well maintained throughout the year and in general were about 25 per cent. above world market prices.

According to British trade reports, the 1937 crop in Izmir will be considerably less than anticipated owing to lack of moisture.

(Textile Raw Materials)

UGANDA.

The total acreage planted to cotton to the end of July was 1,108,000 acres as compared with 884,000 to the corresponding date of last year. Percentage: 125.3. During July, crop condition was satisfactory in the Eastern Province, although dry weather retarded growth in Buloga, Bugwere and Budama districts; some damage by lygus was reported especially in Bugwere. Crop condition in the Buganda Province was also satisfactory except in Masaka district where unusually dry weather had retarded growth; no serious damage from disease and pests was reported. In the Northern Province the weather was favourable and crop condition was normal except in some parts of the Lango district where dry weather affected germination, while in other parts rain was rather excessive and May and June plantings suffered to a more than usual degree from insect attack. In the Western Province, although the acreage planted to the end of July exceeded the plantings for the same period last year, it was expected that the bulk of the crop would be planted during August as weather conditions had so far not been very favourable for planting. It may be said, however, that prospects for the cotton crop in Uganda as a whole were good.

(International Institute of Agriculture)

U.S.S.R.

The hot, fine weather of August over Central Asia and Azerbaidzhan favoured the growth of cotton. The opening of the bolls was general almost everywhere by the end of the month. On September 10, 44,358 metric tons of unginne cotton, i.e., 2.1 per cent. of the figure in the Plan, had been picked in the irrigated regions, and 2,063 metric tons, or 1.1 per cent., in the unirrigated regions.

(International Institute of Agriculture)

A bumper harvest has been gathered in the cotton fields of the Soviet Union this year.

Thousands of collective farms and brigades gathered from three to five tons of raw cotton per hectare ($2\frac{1}{2}$ acres). A particularly high yield

is expected this year in the leading cotton growing republics of Central Asia—Uzbekistan, Tajikistan and Turkmenistan.

The high cotton yield is the result of the introduction of powerful machines into the collective farms. Despite unfavourable weather prevailing in the spring, cotton was sown this year at a much earlier date than in previous years. It is further due to the increased number of ploughings and improved quality of ploughing in the cotton plantations. The use of mineral and organic fertilisers on an area of 900,000 hectares as against 250,000 hectares in 1936, and the substantial improvement in the methods of cultivation of the cotton plant were additional factors which helped to ensure a record harvest.

(Monthly Review of the U.S.S.R. Trade Delegation in the United Kingdom)

WEST INDIAN SEA ISLAND.

When the first estimates of the West Indian cotton crop for 1937 were published, a yield of 2,234,650 lb. was anticipated.

In March a revised estimate was prepared and it was then believed that the crop would amount to 2,096,600 lb., but according to the latest forecast, prepared on August 12, a crop of only about 1,472,600 lb. will be gathered.

This serious decline in the probable yield is due to the unusually dry weather, and needless to say the situation has caused great disappointment in the cotton growing islands. In Montserrat some planters believe that there may be a second crop as a result of the rain which fell at the beginning of August, but in St. Kitts the growers for the most part have given up hope, and are already digging out the trees prior to burning.

The following table shows the acres planted to cotton in the various islands and the yield as estimated at the three different dates :—

				Acres	Original estimate lb.	Revised estimate March lb.	Revised estimate August 12 lb.
Anguilla	..	..	..	500	50,000	40,000	40,000
Antigua	..	..	..	937	140,550	80,500	80,500
Barbados	..	..	..	191	19,000	19,100	19,100
Montserrat	..	..	..	5,000	1,000,000	1,000,000	500,000
Nevis	..	..	..	3,000	300,000	290,000	290,000
St. Kitts	..	..	..	1,500	300,000	300,000	176,000
St. Vincent	5,000	400,000	342,000	342,000
Tortola	250	25,000	25,000	25,000
				<hr/> 16,378	<hr/> 2,234,650	<hr/> 2,096,600	<hr/> 1,472,600

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American Cotton

THE NOVEMBER GOVERNMENT CROP ESTIMATE

The official report on the American cotton crop, issued November 8 by the Crop Reporting Board, indicates a probable production of 18,243,000 bales, exclusive of linters, a record estimate. This compares with 17,573,000 bales estimated a month ago and actual crops of 12,399,000 bales and 10,638,000 bales in the two previous seasons. The average yield per acre is estimated at 258.8 lb., against 249.8 lb. a month ago, 199.7 lb. a year ago, and a final estimate of 197.9 lb. for the crop grown in 1936. The growth in Lower California, which is not included in the United States total, is estimated at 53,000 bales, against 61,000 bales harvested last year.

The following table gives details of production by States, with comparisons (in thousands of bales):—

	1937		1936	1935
	Nov. 1	Oct. 1	crop	crop
Virginia	40	40	30	27
North Carolina	720	695	600	574
South Carolina	950	875	816	744
Georgia	1,470	1,430	1,090	1,063
Florida	41	40	27	27
Missouri	385	370	303	174
Tennessee	630	580	433	317
Alabama	1,520	1,425	1,149	1,061
Mississippi	2,575	2,400	1,911	1,259
Louisiana	1,080	1,000	761	556
Texas	5,150	5,025	2,938	2,961
Oklahoma	858	858	286	565
Arkansas	1,830	1,750	1,303	857
New Mexico	135	130	107	72
Arizona	260	260	190	134
California	680	675	442	240
Other States	19	20	13	7
Total	18,243	17,573	12,399	10,638

In a supplemental report the Washington Department of Agriculture says that the indicated crop is the largest on record. As most of the unpicked cotton is open and subject to weather damage, inclement weather would therefore materially interfere with picking and would result in a considerable loss in the fields. In this report the estimate is based on the amount expected to be ginned, allowing for an average loss in fields. The average bale weight in most States is considerably above the average.

THE NOVEMBER GINNING REPORT

The U.S. Census Bureau reports that up to the close of business on October 31 a total of 13,164,000 bales of this year's crop had been ginned. A year ago the amount ginned was 9,883,000 bales and two years ago it was 7,744,000 bales. Since October 17, when the last report was made up, 2,096,000 bales have been ginned, against 1,312,000 bales in the same period last year and 1,154,000 bales in 1935. The total includes 234,000 round bales, 3,000 bales Sea Island, and 5,000 bales American-Egyptian, against 186,000 round bales and 6,000 bales American-Egyptian shown in the corresponding report last year.

The following table gives details of ginnings with comparisons :—

				1937	1936	1935
Alabama	..	..	..	1,344,000	1,052,114	969,358
Arizona	..	..	..	95,000	78,551	50,352
Arkansas	..	..	..	1,262,000	1,061,613	544,862
California	..	..	..	273,000	202,203	103,659
Florida ..	..	..	..	34,000	27,079	25,805
Georgia	..	..	..	1,250,000	926,062	960,872
Louisiana	..	..	..	919,000	713,674	515,590
Mississippi	..	..	..	1,905,000	1,703,634	1,125,847
Missouri	..	..	..	210,000	251,925	88,083
New Mexico	..	..	..	62,000	63,670	29,178
North Carolina	..	..	..	508,000	347,900	393,357
Oklahoma	..	..	..	481,000	224,545	203,339
South Carolina	..	..	..	771,000	557,861	615,011
Tennessee	..	..	..	355,000	340,989	197,760
Texas ..	..	..	..	3,665,000	2,302,429	1,903,142
Virginia	..	..	..	19,000	18,012	14,012
Other States	..	..	..	11,000	10,269	3,385
Total	..	..	..	13,164,000	9,882,530	7,743,612

MR. FRED TAYLOR

Mr. Fred Taylor, Principal Marketing Specialist of the Foreign Service Division of the U.S. Department of Agriculture, has recently returned to Europe to pursue further the work he began last year in

connection with the examination of false packed and otherwise un-merchantable bales of American cotton.

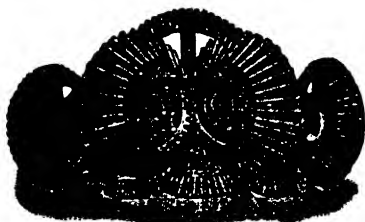
Mr. Taylor has appealed for the same co-operation between spinners and himself as was extended to him during his last visit, the result of which has done much to open the eyes of the ginner and exporters of the South with regard to the justification and the widespread nature of spinners' complaints. He hopes to have ample opportunity of inspecting bales of new crop cotton, in order to determine how far the intensive propaganda against false packs which is being disseminated by the U.S. Government and the various shippers' and ginner's associations in the United States, is succeeding.

Spinners are therefore asked to notify the Head Office of the International Cotton Federation whenever they have trouble with false packed bales, and Mr. Taylor will be pleased to visit them and inspect the bales in question, as heretofore. It is only by renewed co-operation with the U.S. Government that the spinners can hope to obtain an improvement in the desired direction.

Whilst in England, Mr. Taylor will be located at the American Consulate, Ship Canal House, King Street, Manchester.

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Visit to U.S. Cotton Belt, 1937

Report prepared by the General Secretary

THE IRRIGATED COTTON AREAS OF AMERICA

The chief irrigated cotton areas of the United States are in the States of California, Arizona, New Mexico and Texas. All these States, with the exception of Texas, receive annually an average rainfall of from 10-15 inches, which is totally inadequate to raise crops, but in the high adjacent hills rainfall is heavy in winter. The rivers carrying the water down from these mountains attracted the early settlers, who would divert the water with the help of a team and plough on to the lower lying river bottom land. Within a short time these rivers were fringed with farms and the development of further land for irrigation purposes became more difficult and costly. Areas lying higher than the lands already developed were often of superior quality, and in order to irrigate these the construction of reservoirs and feeder canals was necessary, entailing huge expenditures.

The Reclamation Act was passed by Congress in 1902, in order that arid and semi-arid lands suitable for irrigation farming could supply homes and crops for citizens of the U.S.A. and make use of the land which was waste and the water which either ran to waste or was used uneconomically.

At the present time there are 38 irrigation projects in the United States of which only four are situated within the Cotton Belt. These are:—

The Salt River Project in Arizona.

The Yuma Project in Arizona-California.

The Rio-Grande Project in New Mexico-Texas.

The Carlsbad Project in New Mexico.

The All-American Canal, and the Central Valley Water Project, California, are under construction.

Besides these federal irrigation schemes, there are several private enterprises in New Mexico on the Pecos River at Roswell and the area round Brownsville, Texas. In the San Joaquin valley irrigation is mostly by pumps installed by the owner of the land, and again quite recently pump irrigation has been established in the Panhandle area of Texas.

CALIFORNIA

Cotton was first cultivated in the San Joaquin Valley about 1870, but was soon abandoned on account of labour and transportation difficulties which made it impossible to compete with the production of the shorter staples in the rain grown cotton of the eastern cotton belt. The industry has, however, been re-established on a new basis of a one variety cotton community for the whole state and upon new cultural methods developed in other irrigated valleys of Southern California and Arizona. It was

earlier believed that Pima Egyptian should be grown, but since then it has been found that a shorter variety named Acala is more suitable to the climatic conditions and gives a better yield per acre than did Pima long staple. Pima was grown successfully for a number of years round Fresno and Bakersfield, but it was found that Acala was more suitable for wider areas including many outlying districts, where in some years the seasons proved too short for the maturing of the long staple Pima. The advantages of growing only a single variety of cotton in this rapidly developing area were soon recognised, and in order to make it possible to include areas which could not grow Pima successfully, a variety suitable to the whole state was finally adopted. Acala is early, and produces large bolls which open widely so that picking is easy and higher average yields are obtained than from any other variety. The fibre is now of excellent uniform quality, measuring from $1\frac{1}{16}$ in. to $1\frac{1}{8}$ in. under favourable growing conditions. The seed at present used has been specially bred for the climatic and cultural conditions in California by the United States Experimental Station at Shafter.

The San Joaquin Valley is the longest valley in California, being approximately 200 miles long and 30-40 miles wide, lying between the coastal range and the Sierra Nevada mountains on the east. It is practically surrounded by these high mountains which give it protection from the cold coastal winds, but it is not subject to the extremely high desert temperatures of some of the other California valleys. The latest frost date in Spring is about April 1st and in the autumn the first killing frost occurs on an average on November 1st, so that under normal climatic conditions a growing period of seven months may be expected, which is ample time in which to make a cotton crop. Summer temperatures average above 90 degrees F. and often reach more than 100 degrees F. in the shade, but the nights are cool and give the plant a chance to recuperate from the hot temperatures during the day. These climatic conditions are, in fact, almost ideal for the cotton plant and its proper development, so that all things considered the valley is the largest potential cotton growing area in California.

Cotton is also still being grown to a small extent in the Imperial Valley on the southern border of the state. Shortly after the war a large area in this valley was devoted to this crop, but most of this land has now been planted to fruit, and only 13,000 acres are now under cotton in this district.

Other valleys in California still growing cotton are the Coachella Valley and the Palo Verde Valley, although this district was once the most important cotton area of California, in 1937 only 17,500 acres were planted. For some reason its cultivation has declined in this area in favour of other crops, chiefly fruit, and has not regained its former importance.

Some of the land watered by the Yuma irrigation scheme is situated on the Californian side of the Arizona boundary, but here again cotton cultivation on the whole of the Yuma project only extends to 14,000 acres and very little of this area is actually in California.

CALIFORNIA A ONE VARIETY COTTON DISTRICT

An Act to provide for the growing of only one variety or species of cotton, namely, Acala, in the state of California was passed by the State Government in 1925.

Section I of the Act states that the purposes of the Act are to promote and protect the planting and growing of cotton and that it is believed this can best be accomplished by restricting the planting of but one variety of cotton, "Acala," in order to bring the cotton growing industry to its highest possible development and ensure the planting of the most superior and profitable species of cotton.

The Act makes it unlawful to plant any seed or plants of any other variety of cotton other than "Acala." It even prohibits the picking, ginning or having in one's possession seeds or plants of cotton other than "Acala." Any person who violates this law is liable in a civil action for all damages that may be occasioned by the violation of the Act.

In the preamble the advantages claimed for a one variety cotton community are the following:—

"That the planting of pure seed is essential to the production of a more merchantable and better grade of cotton and cotton seed, and for the production of a grade of fibre best suited for manufacturing purposes; that the planting of impure seed or plants other than that permitted in the areas hereinafter defined is an economical harm and loss to the planter thereof and an irreparable injury to the adjoining or neighbouring growers; that the restriction of the use to which cotton lands may be used, as provided in this Act, is essential to the highest development of the cotton growing industry and of benefit even to one who would violate the provisions of this Act; that it is essential that but one variety of cotton should be ginned in the districts in this Act defined, otherwise the gin will mix the different kinds of seed, crossing takes place in the fields, the varieties are mongrelised, and cease to be uniform, the fibre deteriorates in quality, and the seed rendered unfit for planting; that solely by restricting the growing of one variety or species of cotton in certain areas can the fibre be grown of uniform length and quality, and the highest price paid for the cotton thus obtained, and the production of fibre of different lengths or grades be prevented; that fibres of different lengths and grades are commercially inferior, and when assembled in one lot or grade are classed and given the value of the lowest grade in the lot or sample; that Acala cotton is now the variety or species of cotton that has been most highly developed and improved and most suited commercially for growing in the districts in this Act defined; that if future experiments should develop and improved variety or species of cotton, this Bill can be amended to designate it; and that the districts in this Act defined can be altered, restricted or extended."

THE ACALA COTTON VARIETY

Acala cotton is a superior upland type discovered by Dr. O. F. Cook and C. B. Doyle, U.S. Government botanists in Southern Mexico, in 1906. It is very early and productive and has fibre of excellent quality and is adapted for cultivation over a large part of the American Cotton Belt, forming the bulk of the crop in the irrigated districts of Texas, New Mexico, Arizona and California. On account of its ability to produce good crops in a short growing season, it is specially suited to the weevil infested sections as well as to the areas having a short growing season along the northern edge of the Cotton Belt.

The Acala is one of the earliest and most prolific varieties and has given the highest yields of lint per acre besides producing superior and

longer fibre than other large boll varieties. The bolls are large, easily picked, the fibre of even length in a good strain and the staple runs from $1\frac{1}{16}$ in. to $1\frac{1}{8}$ in. under favourable climatic and growing conditions.

The upright habit of the "Acala" plant with short lateral branches is an added advantage over the more spreading habits of the Texas big boll varieties and permits of closer spacing of the rows.

In the eastern sections of the Cotton Belt more open spaces between the rows permits of better weevil control, for the fallen punctured squares are more likely to be dried out by the sun with the ultimate death of the weevil grub inside the fallen square. The absence of interlacing lateral branches between the rows makes for more rapid picking and



The Acala Cotton Plant.

fewer bolls are lost or damaged by hanging down near the soil. Acala is now being planted in a great many sections of Texas and it is thought will take the place of many other varieties in the near future.

The first strain of Acala cotton planted in California in 1920 showed a decided neppiness, disliked by the spinner, but about 1930 an improved strain of "Acala" was developed by the Shafter Experimental Station near Bakersfield which has had the nep practically bred out of it, with the result that the cotton now being planted shows very little sign of this former disadvantage. I have talked to spinners who used Californian cotton several years ago, and they were so dissatisfied at the time with its

unevenness and nep that they now refuse to consider using it again in their mills. On the other hand, I met a spinner of a tyre yarn mill in America who uses nothing else and he declared that he was perfectly satisfied with it now. Furthermore, he stated that several years ago it was very neppy and uneven, but that it had improved during each successive year. I was also shown letters from European spinners to merchants expressing satisfaction with Californian cotton and in the Carolinas and Memphis I heard complaints from merchants that Californian cotton was competing now very strongly with the Memphis territory production. I have heard, however, that some spinners of Californian cotton state it does not mix well with other cottons and that it requires more humidification during spinning. One prominent Memphis exporter informed me that California low grades were definitely better and stronger than Delta lows and the moisture content of the Californian staple was so small that it paid to ship this cotton to Memphis and resell it as Delta cotton to American or European mills. I hear in several places that irrigated cotton was often sold as rain grown cotton for the simple reason that spinners could not now tell the difference as it had improved so much; this in spite of the spinners' demand excluding irrigated cotton in their contracts.

SEED PURITY AND IMPROVEMENT

Experience has shown that no regular supply of a superior variety of cotton can be expected unless stocks of pure seed are produced and maintained and that moreover, no extensive production of pure seed is possible except in communities where only one variety of cotton is produced.

At the time (1925) of the introduction on the one cotton variety law in California the Experimental Station at Shafter was beginning to produce better qualities of Acala cotton, a non-profit cotton seed distributing corporation was subsequently formed (The California Cotton Planting Seed Distributing Corporation). This organisation has been in being since 1929 and its manager is Mr. G. J. Harrison, cotton agronomist of the Shafter Experimental Station.

The cotton seed nucleus for the whole of the State of California is selected and grown on the Shafter Station. Sufficient plants of Acala are selected each year in the plant breeding plots for fibre length, fineness and strength; fibre uniformity, lint percentage (i.e., percentage of lint to seed in the boll), etc. The plants chosen must yield fibre equal to or better than specified standards. Staple length must equal $1\frac{1}{4}$ in. in the breeding plots when handpulled for under present commercial ginning—there is always a loss in staple length. The gin outturn or lint percentage must be 38 per cent. or better. I was informed that nep was one of the points which was carefully watched during these breeding experiments and neppiness had now practically been bred out of the Acala strain at present being used in California. Incidentally, nep is

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a hereditary fault in a strain of cotton and is not the result of poor ginning.*

The nucleus plants chosen are self-fertilized by hand to prevent any crossing and yield about 25 lb. of cotton seed the first year, which are planted in the following year by the station botanists on an increase plot of one acre two miles away from the station, for the station itself grows various types and varieties experimentally and there would be a danger of cross fertilization if grown near these other plants. This one acre plot yields sufficient seed to plant a 20 acres increase plot in the third year and the resulting seed is handed over to the seed distributing corporation for planting and increase in the fourth year. During all these three years the botanists are carefully watching these plants, continually going through the fields and weeding out any plants which appear to differ from the type or strain. Certain differences in the shape of the plant, leaf, branching habits, position of the bolls, colour of the flower, etc., permit of an expert immediately recognising a "rogue" plant, which is immediately rooted out. For the fourth year's planting the corporation distributes the seed received from the station to its own members who own 800 acres of good cotton land; these members are all careful, experienced planters with facilities for good cultivation, and moreover, they must have good clean land and ample water supplies, and must abide by the rules of the organisation. At the end of the fourth year sufficient seed is obtained on these 800 acres to plant 18,000 acres in the fifth year. Here again the organisation distributes the seed from its full members grown in the fourth year to its associate members who own 18,000 acres and who are all under a contract with the corporation to gin the resulting seed at ginneries authorised by the corporation to gin planting seed. In the fifth year sufficient pedigree seed is produced on the 18,000 acres to plant at present 75 per cent. of California's total acreage. All this seed is specially tagged by the association and is sold at a reasonable price to non-member cotton growers in California only. The extra cost for this tagged seed is only a few cents per bushel more than gin run or ordinary seed. The association is at present endeavouring to build up a reserve stock of pedigree seed before selling this excellent strain to the other states but in view of the rapid expansion in cotton growing which has taken place in California no seed has so far been sold in other states.

It should be mentioned that the 800 and 18,000 acres planted by full members and associate members is carefully inspected and rogued out by the station botanists. These members and associate members receive payment for their crop of cotton seed out of the profits of the association, all profits being distributed.

The corporation selects good ginneries in various parts of the valley to gin this registered seed and insists on the thorough cleaning of the ginning machinery, seed conveyers and pipes by means of suction machines, before the ginning of registered seed cotton. This action is taken to

* In America a distinction is made between neps and naps. Neps are the small pin head tufts of twisted immature fibre, while naps are caused at the gin by ginning damp cotton. Naps are twisted tufts of fibre about an inch long.

eliminate any danger of mixing this seed with the seed from non-members. As another precaution the seed from the first two bales is not saved for planting. Any ginner who infringes the instructions of the corporation is at once disqualified from ginning registered seed cotton until the manager has been replaced. I was told that very little "gin run" or unregistered seed is planted in California as the farmers have now realised the advantages of obtaining seed as pure as possible and also the registered seed is only a few cents a bushel dearer than gin run seed.

LAND LEVELLING

When cotton was first cultivated in California under irrigation the farmers did not understand thoroughly the method of levelling the fields, with the result that many fields had low or high points which were undesirable for the production of uniform cotton. Naturally, the high



Levelling the Fields.

spots received insufficient quantities of water, and the staple on these points was shorter than that grown elsewhere in that field—a fact which led to the spinners' contention that the staple of United States irrigated cotton was not uniform in length. During the course of several years' cultivation, however, these fields have been levelled out and the high and low spots are disappearing, although the fields are never quite dead level, as it is usual to have a gradual slope on the field from the point where the irrigation water is admitted. On sandy soils a steeper slope can be employed than on clay soils or soils which do not readily absorb moisture. In the San Joaquin Valley nearly all water is pumped from

wells so that small quantities or heads of water are carried in furrows, which makes it less important that the land be uniformly level in more than one direction. Where the land is not uniformly level the high spots are also likely to dry out so that the seed may fail to germinate. In the low spots the seed may rot if wet too long and cause luxuriant growth of the plants and late opening of the bolls, resulting in damage from frost and more difficult picking.

Nowadays, the fields are usually levelled with the aid of more modern machinery with better results than in the earlier days of irrigation.

New virgin land is usually planted to alfalfa grass, which remains for three years. This crop sends down its roots two feet into the soil and adds a considerable amount of humus to it.

METHOD OR IRRIGATION

As already mentioned the chief system of irrigation is that of pumping up the subsoil water by means of electric pumps. These wells are sunk 150 to 300 feet deep, varying with the location of the well. The water in the subsoil seeps through from the rainfall during the winter, but most of it percolates down from the melting snows in the mountains where heavy falls take place during the winter months. In practically all the main pumped areas the underground water level has been decidedly lowered from year to year and some people believe if many more wells are drilled that it will fall at a faster rate than it can be replenished by the melting snows. To supplement this the Government have in hand a scheme entitled the Central Valley Water Project which will dam up the Sacramento River flowing into the bay of San Francisco; this water will be led by canal 400 miles south into the San Joaquin Valley which can quite easily bring the total cotton acreage to 1,500,000 acres. This water will be available in the Valley in or before 1942.

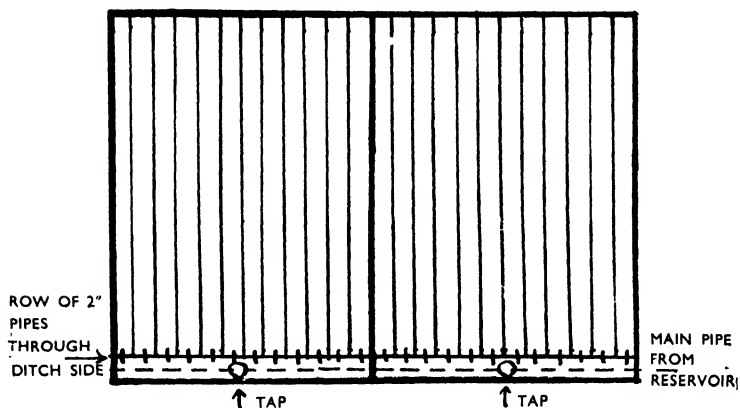
A little canal irrigation is done by tapping the rivers flowing from the surrounding mountains, but so far canal irrigation is of much less importance than well irrigation.

The site of a well is usually chosen by the farmer on the highest point of his land and each well suffices to irrigate about 80 acres of land. Close to the well delivery pipe he builds an earth reservoir about 50 feet square and 8 feet deep, into which all the water is first pumped and from this reservoir the water is led on to the fields either by open ditches or by means of concrete pipes.

Two systems of irrigation are followed, namely, row irrigation and flood irrigation; the former is usually used in connection with distribution to the fields by pipes and the latter in connection with canal irrigation.

In the pipe system a ten inch diameter rough concrete pipe carries the water from the reservoir to the field; this supply pipe runs the full length of the field to be irrigated and every 40 feet along this pipe there is fitted a tap. Up to this point the pipes are all about 1½ feet below the soil level but the stop cock can be reached by hand down a vertical pipe. When this stop cock is turned on the water bubbles up through the vertical pipe and into a short shallow ditch parallel with the side of the

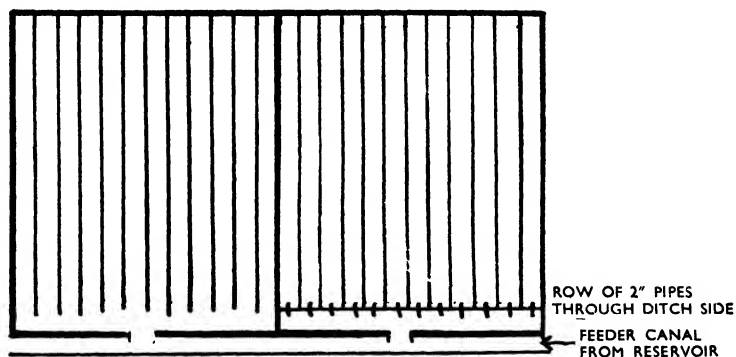
field. The top of this ditch is the same height as the soil in the cotton row and water is let out between each row of cotton by means of 2 in. pipes cutting through the ditch side. Each ditch irrigates about 10-12 cotton rows so that should any section of the field require less water, the stop cock serving that section can be turned off, or even three, two



Pipe Irrigation.

or even one row of cotton can be left dry by stopping up the 2 in. pipe with sods, grass, etc.

Flood irrigation is the system adopted where the whole field or large sections of a field are irrigated from one and the same point of control. The water from the canal is merely let into the field by digging away one or two feet of the soil on the side of the canal which of course must be at a higher level than the surface of the field to be irrigated.



THE VERTICAL LINES ARE COTTON ROWS PLANTED ON A HILL ABOUT 6 INCHES HIGH. THE HEAVIER LINES REPRESENT THE FIELD OR BLOCK IRRIGATED FROM EACH POINT.

Canal Irrigation.

Flood irrigation is more wasteful of water than row irrigation for small areas in certain fields can be dealt with separately in case of need by the latter method. Sometimes in connection with the open canal irrigation the water is fed from the feeder canal into a ditch and then to each cotton row by a 2 inch pipe running through the side of the ditch just as described under pipe irrigation.



Flood Irrigation.

Pipe irrigation is said to be more economical of water than is the canal system as no water evaporates from the pipes whereas evaporation is always taking place from the open canals. The piping installation pays for itself in two or three years by the water it saves and the consequent saving in electric current on account of less pumping being required. The total capital cost of pump installation, but not the piping is said to be \$50 per acre and the cost of irrigating an acre of cotton land was given to me as \$10 per season, but in view of the increased yield per acre it is considered well worth the extra outlay on pumping and on capital sunk in wells and piping. The state of California last year averaged 574 lb. per acre as against an average of 197 lb. for the whole of U.S.A.

The fields are irrigated prior to planting which usually takes place in April. This first irrigation is usually 6 to 8 inches in depth in order to soak the soil to a depth of 72 inches and supply the young plant with adequate moisture to cause formation of a good tap root. When the soil surface is sufficiently dry to enable field work to be carried out the seed is sown and germinates without any further irrigation. The next irrigation is given at the end of June or beginning of July, for if watered too early

lateral roots instead of tap roots will be formed with the result that the plant cannot withstand the hot days and will wilt. Irrigation then takes place every 15 to 20 days. From the middle to the end of September, water is withheld with the object of making the bolls mature, for watering merely causes the plant to keep on growing and putting on fresh squares and blooms. However, some people irrigate slightly in October.

The quantity of water put on the fields throughout the growing season is as follows :—

March or April	..	..	..	..	6 to 8 inches
June	..	..	..	..	4 "
July..	..	..	..	..	9 "
August	..	..	..	..	11 "
September	..	..	..	..	7 "

Most farmers make the mistake of over-irrigating, but they have not the facilities of finding out the best times for irrigating. It is usual to irrigate before the plant shows signs of wilting ; at no time of its growing period should the plant be allowed to wilt, moisture should be given before this stage is reached, and in consequence the planter over-irrigates to try to counteract this tendency. Theoretically irrigation should take place whenever the moisture content of the top 5 feet of soil has dropped to 7 per cent. It has been found that when the soil moisture is kept above this percentage, the cotton plant makes the best progress. With adequate moisture growth, squaring and flowering is increased the regularity and length of staple is improved and what is more important the yield per acre is increased. One plot of 20 acres on the Experimental Station in 1936 yielded under the above treatment an average of 1,389 lb. of lint cotton per acre, i.e., over $2\frac{3}{4}$ bales per acre. The cost of production, given an average yield per acre was stated to be 6-7 cents per lb. of lint cotton inclusive of all charges as against about 12 cents per lb. as stated by the United States Department of Agriculture for the whole belt.

GRADE AND STAPLE PRODUCED

As previously mentioned, the staple of Acala cotton produced in California varies between $1\frac{1}{16}$ in. and $1\frac{1}{8}$ in., but the cultural methods of the farmer and the ginning practices of the average commercial saw ginner are not as efficient as those of the Government botanist, with the result that the staple length of the commercial cotton suffers.

Actually during the last few years the following amounts of cotton were produced of the various staple lengths :—

	1934	1933	1932	1931	1930	1929
Shorter than $\frac{7}{8}$ in. ..	100	—	—	8,900	—	800
$\frac{7}{8}$ in. and $\frac{11}{16}$ in. ..	1,800	200	2,200	100	1,700	5,000
$\frac{11}{16}$ in. and $\frac{13}{16}$ in. ..	1,500	2,900	3,900	2,400	13,900	17,100
1 in. and $1\frac{1}{16}$ in. ..	12,200	48,300	13,400	25,600	41,200	119,600
$1\frac{1}{16}$ in. and $1\frac{1}{8}$ in. ..	139,600	123,200	57,900	98,000	160,000	104,200
$1\frac{1}{8}$ in. and $1\frac{3}{8}$ in. ..	96,300	36,100	46,800	33,900	39,200	7,400
$1\frac{3}{8}$ in. and $1\frac{7}{8}$ in. ..	—	—	200	2,300	300	—
$1\frac{7}{8}$ in. and longer ..	—	—	—	—	—	—
Total Crop	251,500	210,700	124,400	171,200	256,300	254,100

Figures for more recent years are not yet available.

Grades are very high, the preponderating quantity falling within the category of Good Middling extra white in colour.

				CALIFORNIA		Total, crop of—			
Grade				1934	1933	1932	1931	1930	1929
				1,000	1,000	1,000	1,000	1,000	1,000
				bales	bales	bales	bales	bales	bales
All grades ²	..	..	..	251.5	210.7	124.4	171.2	256.3	254.1
Extra White	..	..	..	226.4	186.2	119.2	151.1	254.9	219.1
Above 3-G.M.	..	..	..	2.0	—	1.1	.4	.2	—
3-G.M...	..	..	..	127.3	108.2	71.6	52.4	59.9	112.9
4-S.M...	..	..	..	85.7	70.9	37.9	73.9	107.7	66.0
5-M...	..	..	..	11.1	6.0	5.7	20.8	56.8	24.8
6-S.L.M.	..	..	..	.3	.7	1.6	2.2	16.9	13.5
7-L.M...	..	..	..	—	.2	.5	.6	2.9	1.9
Below 7-L.M. ¹	..	..	..	—	.2	.8	.8	10.5	—
White	..	..	..	10.3	15.5	.2	9.6	—	23.7
1-M.F...	..	..	..	—	—	—	—	—	—
2-S.G.M.	..	..	..	—	—	—	—	—	23.4
3-G.M...	..	..	..	—	—	—	—	—	.2
4-S.M...	..	..	..	.9	3.5	—	.8	—	—
5-M...	..	..	..	4.4	5.1	—	2.7	—	—
6-S.L.M.	..	..	..	3.5	2.8	—	3.4	—	—
7-L.M...	..	..	..	1.1	.8	.1	2.1	—	—
8-S.G.O. ⁴	..	..	..	.3	2.6	—	.5	—	—
9-G.O. ⁴	..	..	..	.1	.7	.1	.1	—	.1
Spotted	..	..	..	8.4	7.9	2.5	2.0	1.4	5.1
3-G.M.	..	..	..	—	1.3	.1	—	—	—
4-S.M...	..	..	..	1.8	3.7	1.3	1.5	.8	1.5
5-M...	..	..	..	4.4	1.9	1.0	.4	.4	2.7
6-S.L.M. ⁴	..	..	..	1.3	.7	.1	.1	.2	.8
7-L.M. ⁴	..	..	..	.9	.3	—	—	—	.1
Yellow Tinged	..	..	..	.1	.6	—	—	—	—
2-S.G.M.	..	..	..	—	—	—	—	—	—
3-G.M...	..	..	..	—	—	—	—	—	—
4-S.M...	..	..	..	—	.1	—	—	—	—
5-M. ⁴	..	..	..	.1	.1	—	—	—	—
6-S.L.M. ⁴	..	..	..	—	.2	—	—	—	—
7-L.M. ⁴	..	..	..	—	.2	—	—	—	—
Gray	..	..	..	4.7	.4	.2	.5	—	.1
3-G.M...	..	..	..	—	—	—	—	—	—
4-S.M...	..	..	..	3.8	.2	—	.3	—	—
5-M. ⁴	..	..	..	.9	.2	.2	.2	—	.1
No Grade ^{4 6}	..	..	..	1.6	.1	2.3	8.0	—	6.1

I was informed that it was difficult to find cotton lower than Middling until the frosts came in November. There are three pickings of cotton, the bottom crop in September, middle crop in October and the final picking usually includes the bollies and top crop picked in November after the frosts and fogs have tinged the fibre.

PROSPECTS OF COTTON IN CALIFORNIA

The high yields per acre for cotton being obtained in the San Joaquin Valley in itself induces an increasing number of farmers to plant cotton

each year in this State, progress has been phenomenal in spite of agitation for reduced acreage. The climate is right, there are no pests and so far moisture has proved sufficient. Another point which has persuaded fruit growers to invest in cotton planting is the fact that open cotton in the field does not deteriorate as does fruit when ripe. In recent years there have been serious labour disputes with fruit pickers just when the fruit is ripe on the trees and the farmer feels that with cotton if there is a picking wages dispute he is not so to speak "between the prongs of a cleft stick," for the cotton will wait until he can import pickers from elsewhere, for there is very little rain at any time of the year to damage the grade.

The cotton grower not only makes a good profit from his yield of lint, but it should also be mentioned that the Californian seed grown under irrigation has a larger cotton seed oil content and therefore better oil milling value than seed in rainfall areas. This has led to the establishment of a number of oil mills in California, the owners of which undertake the financing of the cotton farmer through agencies chiefly associated with cotton ginneries. Yields of cotton are on the whole relatively certain and the dangers from climatic conditions and pests are practically non-existent, so that the risk in making loans to cotton farmers are much less than they are in rainfall sections. Consequently, rates of interest to cotton planters are much lower here than in other sections of the Cotton Belt. In the other sections of the Cotton Belt bankers usually undertake the financing of the cotton farmer, but in California this service is performed mainly by cotton seed millers, chain ginneries or cotton merchants; people who are in closer touch with the business.

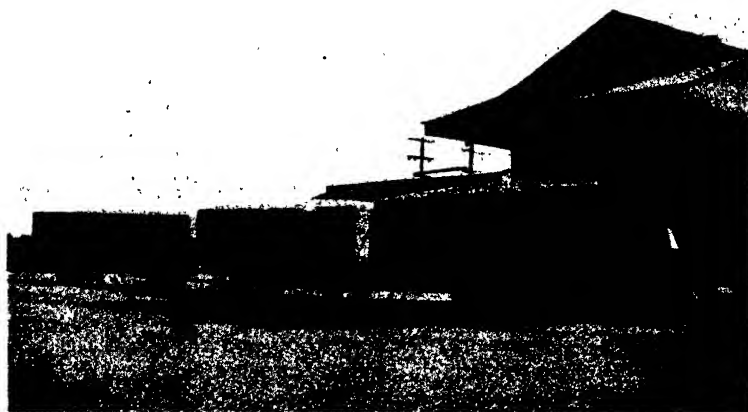
Even in the face of reduced prices the cotton grower in California is able to sell at least 50 per cent. of his crop in advance of picking and before the heavy movement from the whole belt sets in when prices and basis ease off. The farmer knows before hand practically to a bale how much cotton he will make, he can also rely in advance on the grade and staple which he will pick, so that he can sell in advance and usually obtains a premium of perhaps a cent a lb. for good grades and longer staples above what he obtains later in the season.

The Government is building the All-American Canal in the Imperial Valley to the South of California on the American side of the Mexican border; when this is complete another million acres will be brought under the plough, most of which will be put to cotton as I am told there is not the population available to pick more fruit. No doubt families will settle in the Valley from the others states, but cotton is the chief crop expected to be grown. Reference has already been made to the Central Valley Water Project, which will increase the San Joaquin Valley cotton acreage to 1,500,000 acres.

The acreage in California would undoubtedly have increased in 1933 as soon as devaluation of the dollar and price increase occurred had it not been for the Government acreage restriction and the Bankhead Act, for cotton is very profitable at 12 cents. The rapid increase during the last two or three years has been due to the desire on the part of the farmer to raise his basic acreage as rapidly as possible in view of the possibility of further Government acreage restriction.

European spinners on the whole still seem diffident in taking Californian cotton, no doubt this attitude is a result of past experience, but it should be remembered that during the last five or six years important improvements have taken place in the strain of cotton planted. I examined samples of last year's crop which showed no sign of nep in the higher grades. The fields are now more level than they used to be, resulting in improved regularity in staple. Spinners who buy good grades of this cotton again (not bollies) will be surprised at the improvement in spinning value. During recent years the major portion of this crop has been exported to Japan, as freight rates from Los Angeles by Japanese boats are low, but the basis for Californian cotton is usually 50 to 60 American points, which more than covers the higher freights from Los Angeles than from the Gulf ports to Europe. No doubt if the traffic showed signs of increasing, lower rates could be obtained. In regard to this matter of freight, exporters complain that there should be no need for freights from Los Angeles to Europe to be any higher than from Los Angeles to Japan and if this were the case more Californian and Arizona cotton would find its way to European ports.

The ginneries are all in the hands of two or three financially strong firms of cotton exporters who are very careful to gin the cotton they receive with due respect to the quality of the cotton they turn out. Speeds are slow in comparison with the older sections of the belt, for on an average only $4\frac{1}{2}$ bales are ginned per hour as against 7 in the east. In most cases the ginner buys the cotton he gins as it is the ginner who finances the farmer during the growing season. Ginneries are mostly modern, as the expansion of cotton production is only of recent date and they are fitted with all modern cleaning devices. Cotton is brought to the ginneries in huge motor lorries and trailers, holding from two to four bales of seed cotton in each, so that there is little chance of false packing or two-sided bales.



Seven Bales arriving at the Gin in California.

NEW MEXICO—TEXAS

The largest land reclamation project in Texas is that of the Rio Grande, which flows through the State of New Mexico and then forms the international boundary between Texas and Old Mexico. The irrigated territory lies along the river from about 100 miles north and 40 miles south of the city of El Paso in Texas, and occupies the rich, alluvial soils of the river valley having a maximum width of six miles. The Elephant Butte Dam which serves this area has been built across the river in New Mexico, 120 miles north of El Paso.

CLIMATIC CONDITIONS

The project is situated at an elevation of 3,600 to 4,100 feet above sea level and has a healthful and agreeable climate throughout the year. The summer temperatures which are high, are moderated by the dryness of the atmosphere and altitude. Work in the fields is never suspended on account of high temperatures during the middle of the day. Winters are generally short, dry and open, permitting outdoor work throughout the whole year. The average rainfall is only 8.60 inches per annum, and this falls mostly in winter, hence the necessity for irrigation. The average killing frost in the spring occurs on April 9th and the earliest known frost in autumn on October 27th, thus the length of frost-free weather is 202 days. The average lowest winter temperature is 10°F. above zero and the highest average summer temperature is 102°F. The average July temperature at El Paso is 82°F. and during December and January 45°F.

Of perhaps more importance to cotton than any other climatic factor in this region is the large number of sunny days. On an average there are 215 clear sunny days in the year; 103 are part cloudy and only 47 cloudy. The cloudy and part cloudy days nearly all occur during the winter when the crops are not in the ground so that plants grow to perfection and, furthermore, the character and grade of the cotton staple benefits, providing moisture conditions are favourable.

WATER SUPPLY

The Elephant and Butte Dam was built with the object of storing and regulating the surplus water of the Rio Grande. Before the erection of this dam the storm water coming down in the winter time found its way to the sea without being utilised. The dam stores up this surplus water which is let out during the dry period to irrigate the fertile plains situated lower down the valley. The dam was completed in 1910 and is 2,000 feet long and 200 feet above the bed of the river.

The reservoir is 40 miles long and has sufficient storage capacity to cover 2,638,860 acres of land with one foot of water. The reservoir not only regulates seasonal discharge of the river to meet irrigation requirements, but another smaller dam has been built below the original dam for the storage of water for the production of electrical power. The irrigation works consists of a diversion and distribution system carrying

water to the farms and an extensive drainage system which covers practically the whole area. There are in all, 620 miles of main canals and laterals; there are also more than an equal number of miles of private or individual feeder ditches to complete the system. The drainage system consists of 450 miles of deep drain ditches.

The irrigable area of the scheme is 155,000 acres, of which more than 140,000 acres are in cultivation, mostly in cotton. This does not include 25,000 acres in Old Mexico, which, by treaty based on prior use, have been allotted a water supply of 60,000 acre feet annually. Nor does it include 16,000 acres below the project, which uses water returned from the project to the river. The irrigable area of the valley is divided geographically into the Rincon Valley immediately below the dam and covers 16,000 acres. The next division is the Mesilla, which extends from the head of the "Pass," four miles above El Paso, to 55 miles northwest and has a net irrigable acreage of 82,000 acres; the above two valleys are in New Mexico. The El Paso Valley begins at El Paso city and covers 57,000 acres, extending 40 miles in a south-easterly direction.

SOILS

The soils on the project consist chiefly of fertile alluvial land ranging from sand to adobe, the latter being a heavy clay rich soil. The subsoil consists of alluvial sediments such as coarse sand, silt and clay, but fine sand is usually found from five to eight feet below the surface, the presence of which is utilised to drain off the surplus irrigation water as it seeps through the top soil. Lime and gypsum are generally present in sufficient quantity to keep the soil in a sweet condition, and prevent the formation of what is known locally as "black alkali." Some small areas are affected by "white alkali," which can usually be removed from the soil by leaching, and is washed away through the sandy subsoil to the drains.

Cotton and alfalfa are the principal crops, but corn, vegetables and fruits are also grown for local consumption.

The average yield of cotton is nearly a bale per acre, and yields of a bale and a quarter to two bales per acre are not uncommon. It is a comparatively recent crop, but one of the most profitable because the high yield per acre is practically always assured under irrigation. Then again, the absence of cotton pests and the quality of the staple have tended to make it the main cash crop.

TYPE OF COTTON PRODUCED

The cotton planted is practically all Acala and yields a cotton with a staple of $1\frac{1}{16}$ in. to $1\frac{1}{8}$ in., and as generally no rains fall until nearly all the cotton is picked in September, the grades are high. In fact, most of the cotton, with the exception of the bollie crop, is classed as White. The bollie crop is picked after the first frosts in autumn and is much inferior in quality and strength to the hand-picked crop harvested earlier in the season, which grades, on an average, Strict Middling or Middling.

Cotton was first cultivated in this project in 1919 when 1,584 acres were planted. The fields were not sufficiently level for cultivation under irrigation methods, with the consequence that some portions of the fields received less water than others, resulting in shorter staple in the



A Main Canal, El Paso.



Two bales an acre near El Paso (Tex.).



New Mexico Cotton Field.



A homestead in Rio Grande Valley (Tex.).

drier sections of the fields; this fact led to the spinners' complaints of uneven running cotton. During recent years, however, the fields have been levelled to a greater degree, with the result that the quality of the cotton produced has improved considerably in this respect. The question of nep was stated by merchants to be almost non-existent and samples submitted showed no signs of this undesirable quality. I was told that the better qualities were all sold on description, but the bollies were sold on sample only, and usually to port buyers who, it was suspected, resold this to European mills as rain-grown cotton. The character of any bollie crop is poor, for it will contain a large proportion of immature and weak fibres. The spinner would eventually find out that this poor cotton was irrigated and would consequently condemn all irrigated American cotton, with the result that the name of this type suffered. In fact, there is such a dislike among spinners for irrigated American cotton that Rio Grande Valley cotton is sold in El Paso at 50-75 points off similar types of rain-grown cotton. No doubt the extra freight for the longer haul has its influence on this lower basis prevailing in the El Paso district; nevertheless, spinners who do use it appear to be eminently satisfied with it.

In the New Mexico section of the project area, an endeavour is being made to place the cotton growing industry upon a one variety community basis. The seed used is a type of Acala produced on the Government Experimental Station, situated at Las Cruces. While not yet compulsory to grow this variety, a large percentage of the planters do plant this seed, which is an early maturing variety.

The Experimental Station at Las Cruces has an increase plot of fifty acres, the seed from which is distributed to cotton growers under a special green-coloured tag. This registered seed when planted in the second year yields seed which is tagged under a blue label, which in turn yields seed in the third year for distribution to any cotton grower, under a red tag. Up to this point all the increase plots of the various co-operating farmers are carefully watched for rogue plants or plants not true to type before the seed cotton is allowed to be ginned and the seed set aside for planting purposes in the following year. Five or six ginneries co-operate with the organisation in producing this registered seed, and the ginning procedure is similar to that followed in California. The increase plots under the inspection of state botanists has increased from 854 acres in 1935 to 3,202 acres in 1937. The seed is sold to planters at a price only a little above oil mill prices, so that this registered red tag seed is within the reach of every planter.

Across the boundary in Texas, there is no such organised attempt to keep to one variety, but the peculiar method of financing the smaller farmers almost brings about the same result. There are two important firms of cotton exporters, namely, R. T. Hoover & Co. Inc., and Anderson, Clayton & Co., which finance practically the whole of this Valley crop. It appears that the first firm's special locality is below El Paso and the second is above the city, in the Messila Valley Section. Each firm has an expert who keeps in close touch with all the farmers in their area, and when the latter applies to the firm for financial help, the same is granted in accordance with the farmers' character and ability to produce cotton

and on the condition that Acala cotton seed only is planted. Thus, gradually the whole area is becoming a one variety cotton community with all its benefits, without having recourse to legislation. Very little, if any, cotton other than Acala is planted, with the consequence that staple only varies between $1\frac{1}{8}$ in. and $1\frac{1}{2}$ in. The ginneries are run more slowly in order to deal with staple which is longer than that found in the rain-grown sections. Cotton pests are almost non-existent; the pink boll-worm has been found on occasion, but owing to stringent regulations the pest is practically extinct. On the other hand, there is always the danger of this pest spreading in from Mexico on the other side of the river where a considerable amount of cotton is grown. Any loose cotton or cotton seed shipped into U.S.A. from Mexico is disinfected and as an additional precaution all cotton ginned on the U.S. side is passed through rollers immediately after ginning, so as to crush any live worms which may be in the cotton. All cotton seed is also disinfected. This area on the Rio Grande Valley is entirely cut off from the other cotton sections of the U.S. Cotton Belt by arid deserts, consequently, there is no danger of this pest spreading to the rest of the belt should it obtain a hold in this section. The boll weevil is unknown in this valley and it seems highly probable this pest cannot live and propagate itself in this dry climate.

IRRIGATION

The method of irrigation in the Rio Grande Valley is very simple as compared with that adopted in California. The water from the reservoir is taken into the river where diversion dams divert it into feeder canals. Six of these diversion dams have been built along the river and the main feeder canals bring the water to the fields lower down the valley either by lateral canals or are tapped direct on to the land. The drainage system is simplified because of the underlying sandy subsoil; a deep drainage ditch is cut through to the sandy subsoil level and these run diagonally down the valley into the main river. All the water run on to the fields eventually percolates through the sandy subsoil into these few main drains. No other drains are made as in Egypt where the soil is heavier and deeper and more drains are consequently necessary. The water draining back into the river is used again by landowners lower down the valley than the land on the Government project. The river has recently been straightened in order to facilitate drainage and this has necessitated slight alterations in the international boundary between the United States and Old Mexico.

In New Mexico the land is prepared and the seed planted in the dry soil even before the last frost date in April, but as soon as all danger from frost has disappeared the fields are watered to start germination. This method has a tendency to cake the top of the soil and unless scarified the seed cannot push through the hard crust of top soil. Five irrigations are given in the season.

There is another irrigated cotton district in New Mexico, namely, on the Pecos River situated at Roswell, two hundred miles east of the Elephant Butte Reservoir. It is said that 40,000 acres of land are put to cotton in this area which is irrigated by private wells and pumps.

The cotton is said not to be as good in character as that raised in the Rio Grande. While in Lubbock, Texas, I heard that this Roswell cotton finds its way to Brownwood and Lamesa, Texas, where all tags are removed and it is sold as rain-grown Texas cotton. A permanent bale-marker would prevent this practice.

During the last three years irrigation of cotton crops has been making considerable headway in the Panhandle (Tex.), which lies at the southern extremity of the much talked of American "Dust Bowl." The water is obtained by pumping it up from a depth of 250-300 feet by means of electrical pumps or even windmills. In passing through this section one sees quite a number of fields prepared to receive irrigation water. It is stated on good authority that there are 1,500 wells irrigating from 60,000 to 70,000 acres in this area. The Federal Government is at present making an extensive survey of the shallow water resources of this region which is often afflicted by drought. The tendency in newly established irrigation areas is to attempt to distribute water on too many acres from one well and many of the newer wells are watering 100 or 160 acres.

Despite the recent development of many new wells in the last two years all over the High Plains round Lubbock, the height of the water table has not been lowered greatly, although the authorities realise that there is a limit to the amount of water which can be pumped up. It is believed that the available water is the result of years accumulation of rainfall, and as this area normally has an annual rainfall of only 18-20 inches, it is quite possible that too much could be taken away. The water table would fall to an uneconomic pumping depth and the supply for human beings and livestock may run short. Some people consider that water should only be pumped for irrigation purposes in case of drought, but such good crops are obtained that the incentive to use it every year will always be there.

Of course, crops other than cotton are also irrigated, namely alfalfa, grain sorghums, potatoes and wheat, irrigation increases the yields per acre of all these. Yields of a bale per acre are usual for cotton when watered, as compared with the average without irrigation of between a third to half a bale.

The wells are usually 200 feet deep, but the water level is only 50 feet below the surface; a well with a 10 in. pipe can be sunk for \$600, the pump costs \$1,200 and the motor \$220, totalling \$2,020. With such an installation 800-1,200 gallons per minute are delivered and will irrigate an acreage of 100-300 acres, depending upon the season and the type of crops. During a dry season following a dry winter, cotton is given four waterings of 3 inches depth at a maximum cost of \$4 per acre.

The method of running the water on to the fields is similar to that adopted in the El Paso and New Mexico district, no pipes being used. but the water is first pumped into a reservoir from where it is run on to the fields. The water from the feeder canal runs into a small trench the full width of the field, into which the ditch between each cotton row runs.

If the yield per acre can be doubled and even trebled at the small extra expense of \$4, then it is only natural that the irrigation system will spread very rapidly in this semi-arid section.

There are two other areas in Texas where irrigation is practised,

namely, on the Lower reaches of the Rio Grande north of Brownsville, where 50,000 to 60,000 acres are watered from the river, and also both north and south of the town of Pecos (Tex.) on the Pecos River, which is served by the Red Bluff Dam which has only recently been built.

ARIZONA

The chief irrigation area in the state of Arizona is the Salt River Project which is located on both sides of the Salt River in the vicinity of Phoenix. The climate is semi-tropical, average temperatures ranging from 20°F. to 117°F., but the altitude of the district is 1,200 feet above sea level. The average annual precipitation is only 7.5 inches and the percentage of sunny days per annum amounts to 84 per cent.

The summer days are hot but the nights are cool, and the low humidity makes the high temperatures much less oppressive than lower temperature in localities of higher atmospheric humidity. Frosts which do occur are light and the average period between first killing frost in the fall to the last frost in spring is 69 days.

The project draws its water supply from the Roosevelt dam built across the Salt River in 1911, and also the Granite Reef diversion dam built at the confluence of this river and the Verde River. The project has been operated by the Salt River Valley Water Users Association since 1917, which organisation has constructed three further reservoirs between these two dams for power purposes and further storage capacity. These dams, including the Roosevelt, create a continuous chain of lakes nearly 60 miles long with a total storage capacity of 2,000,000 acre feet of water, that is, it will cover 2,000,000 acres one foot in depth. The project has no drainage problem as the subsoil water level is controlled by pumps which pump it back from wells into the irrigation canals. The canal and lateral canal system, exclusive of farm ditches, totals 1,325 miles.

Electric power of 103,000 h.p. is generated at the eight hydro-electro power stations and every farm on the project is supplied with electricity. The total acreage receiving water from the project is estimated to be 246,498 acres, but only 61,000 acres of this is in cotton, the other crops being chiefly alfalfa, citrus, pasture and truck crops. Besides the above acreage there is another 88,000 acres of adjacent non-project land, to which the water from the project is taken; this is chiefly below the project. The winters are so mild and short that two different crops in the season are produced by most agriculturalists, and these crops are more diversified than in most states of the U.S.A., the following being some of the more important: cotton, alfalfa, grain (winter), cantaloupes, lettuce (winter), dates, grapes, figs, citrus, plums, apricots, peaches, pears, maize and sorghums. Excellent winter pasturage supports large numbers of cattle and sheep.

A large part of the Salt River area was cultivated in prehistoric times and many interesting remains of the ancient irrigation systems and villages exist. White men first began cultivation by irrigation here in

1867, and by 1900, 150,000 had been brought under the plough. This was an area greatly in excess of the capacity of the water supply without storage. In 1911, the Roosevelt Dam and the Granite Reef Dam were completed by the Federal Government, which also unified the system of independent canals and ditches.

QUALITIES OF COTTON PRODUCED

Arizona is the only state in the U.S. Cotton Belt producing Egyptian type staple cotton. This is grown from Pima and a cross between Pima and Sakel. Pima itself is a cross between American long staple and Egyptian sakel. Besides this type of cotton there is grown in larger quantities, on the Salt River Valley Project, the American variety, "Acala," produced from seed imported from Mexico. The Pima variety yields a staple of $1\frac{9}{16}$ in. and the Pima Sakel cross (S×P) $1\frac{1}{2}$ in., all of which is ginned on roller gins. The Acala variety runs from $1\frac{1}{32}$ to $1\frac{5}{32}$, the yield per acre of Acala being double that of the longer varieties. In the Yuma Valley Project on the California border, which is fed from the Boulder Dam on the Colorado River, a variety of Stoneville cotton is grown with success, as this variety appears to suit that extremely hot section better even than Acala. Both the Acala and Stoneville varieties are ginned on saw gins.

Arizona is almost bound to produce a high-grade crop in view of the fine open weather which is usual during the time the crop is in the field. Only the "bollies" are low grade and these are picked after the early frosts and are usually, or should be, sold on sample. For the staple cotton, the United States Government have established special grades starting at No. 1 and running down in grade to No. 5; No. 1 being the highest grade and No. 5 the lowest. There are also official half grades, such as $1\frac{1}{2}$, $2\frac{1}{2}$, $3\frac{1}{2}$ and $4\frac{1}{2}$. The percentage of the top grade produced is high, varying between 25 per cent. to 50 per cent. of the crop each year. Grades 2 and $2\frac{1}{2}$ are covered by 40 per cent. and the balance is grades 3 to $4\frac{1}{2}$, no No. 5 being available.

For the Upland varieties, here again we find grades high, for fully 75 per cent. of the crop classes strict middling and higher in the extra white colour. The shippers state that they have very little complaint as regards nep; of course, bollies are always neppy. The staple lengths of the cotton grown in the Yuma Valley are the shortest of any in the State which, it is stated, is brought about by unfavourable climatic conditions together with the use of gin-run and mongrelised seed. It has been found, however, that the Stoneville variety suits this district very well although as yet the cotton is uneven. An early crop is picked, then the cotton fields are irrigated again which brings on two or three more pickings, depending on the season; sometimes as many as two bales to the acre are produced. There are about 40,000 acres of cotton on the Arizona side of Yuma Valley.

I was informed that the planters prefer to grow the Egyptian type in preference to the Upland varieties, for there is more profit in the long staple. Other advantages are that, although the yield of the long staple varieties is half that of the Upland variety, there is only half the picking,

transport, ginning and bagging cost. It should also be remembered that the price of the longer staples is double that of the shorter.

FINANCING OF PLANTERS

There is no one-variety cotton community organised, but the cotton crop financing firms, which also own practically all the ginneries and oil mills, insist on the planting of Acala as the Upland variety in the Salt Valley. Consequently, practically no other Upland variety is planted.

The method of financing is similar to that adopted in California and on the Rio Grande. The farmer's average production for five years is taken as a basis. The financing firm advances \$30 per bale on two-thirds of the farmer's five-year average production. The total sum is advanced at an interest rate of 6 per cent., but only in monthly instalments until the crop is made in September. Payments will commence, say, in March or April when the fields have been planted. The farmer is not forced to sell his cotton to the financing company, who it should be said also gins the cotton, but it can be sold to the highest bidder, the ginning company charging \$1 per bale commission should it be sold elsewhere, but it retains the right to take up the cotton at the highest bid received. If the farmer neglects his crop the financing company can take it over and complete its production, but I was informed that this only happens very occasionally and only in cases where, through the farmer's neglect, the financing firm sees that it may lose the money it has advanced.

Providing that the financing firm knows its clients and only issues advances to efficient planters, it is almost always a certainty that under irrigation, a full crop will be made. There is really very little risk for there is always an ample water supply and the only pests present worth mentioning are flea hoppers and what is termed locally the "square dauber," presumably the cotton square stainer—all minor pests.

The roller ginneries are all equipped with pneumatic feed pipes and precleaning apparatus for handling the bollie crop. The early pickings, however, are not passed through the seed cotton cleaners which are known to take away some of the fibres' strength. The Government Station at Sacaton is at present experimenting upon a method to obviate the "crimp" in roller-ginned cotton.

Practically all the long staple cotton is taken up by the American tyre mills; in fact, the Goodyear Company have their own plantation at Litchfield, near Phoenix, and produce Egyptian types only. In order to keep their strain of seed pure, the Experimental Station botanists regularly rogue out the companies' fields as in California and New Mexico. The company even go to the extent of prohibiting any person on their estate from keeping bees, with the object of preventing cross pollination from neighbouring crops of the Acala variety.

Irrigation is of the simplest. Furrow irrigation is practised in most cases for cotton, especially on the level plots, but where the land is not quite level the feeder ditches follow the contour lines and is let out to the fields direct from the ditch. Planting takes place in March or April and is preceded by an irrigation sufficient to soak the soil to a depth of six feet. Picking commences early in September or late August.

TO GROW COTTON—OR NOT?

Not many years ago a period of such perfect weather as has been experienced during June and July this year for the cotton crop would have been the cause of great rejoicing throughout the cotton minded South. This optimism would have been well warranted, for a large crop in those days meant that the South would become rich upon the fruits of the earth and the Cotton Belt's population would have the wherewithal to exchange its products for the goods manufactured not only in the United States but also in Europe. Those were the days when the saying "Cotton was King" was true in all respects, and no other nation dreamt of deposing this monarch who ruled in that territory so well adapted for "his" production. Look at the position today. A good crop—large in comparison with those of recent years—is in prospect; instead of optimism, joy and gratitude for the great gift of Providence, the Southern Congressmen demanded from President Roosevelt a cotton crop loan to the planters as soon as the price of cotton fell below 11 cents.

The average American fails to realise that this price is a result of the increased cotton production in other countries, a movement stimulated by the very acts of the American Government through the Federal Farm Board and the Agricultural Adjustment Administration (A.A.A.). If the United States Government will insist upon boosting the price of cotton above the price at which other countries are able to produce it, and if it locks up from three to five million bales so that the spinners of the world cannot use it, even a schoolboy ought to realise that the spinners will cease to demand American cotton. With all this Government regimentation and price control the position becomes steadily worse for the American producer—more cotton grown abroad resulting in a lower world market price—and still the Southern Congressmen are clamouring for the Government to pay the farmer 12 cents a lb. while the world market price is around 11 cents. They cannot see that America has now ceased to control the world market price, and that for every 100,000 more bales produced outside of the United States the position as premier cotton producer will become more and more difficult to regain, yet the Cotton States Congressmen insist on "adding fuel to the fire."

The following table shows more clearly than can be put in words the result of the policy of the American Governments:—

WORLD COTTON ACREAGE

	Average.			Increase	
	1921-22	1925-26		Per cent.	Acres
United States	37,616	30,028	*20		*7,588
Brazil	1,475	5,567	277		4,092
China	4,675	8,530	82		3,855
Egypt	1,768	1,781	1		13
India	23,818	25,219	6		1,401
Russia	771	4,977	546		4,206
Others	4,243	6,800	37		1,557
Total Foreign	36,750	52,874	44		16,124
Total World	74,366	82,902	11		8,536
Foreign per cent. of Total	49	64	—		—

* Decrease.

As compared with the average period, 1921-22 to 1925-26, the acreage planted in 1936-37 in U.S.A. shows a *decrease* of 20 per cent. whereas the acreage of other countries together shows an *increase* of 44 per cent. Brazil showing the most important increase, namely 227 per cent. Practically every other country has increased its cotton acreage. The only important country not to show an increase is the United States, and world consumption of American cotton declined by over 500,000 bales ! If the Southern Congressmen cannot read " the writing on the wall " we should sympathise with everyone connected with the cotton producing industry in U.S.A. Another year of cotton acreage control, damming up of cotton supplies and price fixation will just about make it impossible for the U.S.A. to regain her much coveted position as premier supplier to the cotton spindles of the world.

Can this position be retrieved by America ? Only at great sacrifice by the cotton planters in the South. To achieve this aim they must produce at least 50 per cent. of the world's crop in order to bring down the world's price below such a point that it will not pay the other countries to stay in the business, but as each year goes by with increased crops elsewhere—1935, 13,000,000 ; 1936, 15,000,000 ; 1937, 19,500,000—it will become more and more difficult for America. It stands to reason that neither will it be a profitable business for the American growers—" he cannot have his cake and eat it " but crop control and uneconomic prices have been spoon fed to him during the last six years by politicians anxious to obtain and retain his vote, but at what a cost.

Moreover, at the same time, America must so improve the quality of her cotton and improve the packing in order that the world's spinners will prefer it above any other growth.

If the cotton grower in America is going to sell at less than cost of production (as he must to discourage other countries), the Government must again step in, but not with price fixing or loans or by preventing consumption. The cotton farmer has some lean years in front of him if he still wishes to keep in the export business. The best form of relief for him will be by reduction in his cost of living, relief from all forms of taxation and a *direct subsidy for every bale he produces* and export the cotton not required by the American mills *for what it will bring on the world markets*. I doubt whether by any other means can America again retrieve the dominant position she once held in this field.

What will happen if she fails ? Cotton is the South's only cash crop ; if it is taken from the southern farmer he has no other crop to which he may turn. Corn or maize can be grown but not as profitably as further North ; rice and sugar may be planted only where irrigation is practised : but in any case switching over to another crop would only lead to over-production in the crop taken up, and would result in lower incomes to the farmers in other parts of the States. New industries cannot absorb more than a few of the population without disrupting the industries already established elsewhere in the country, so the problem evolves itself into one of national importance. Cotton is America's chief export commodity, both in volume and from a financial point of view. The value

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of cotton exports exceeds that of any other export commodity, in fact it used to amount to $\frac{1}{3}$ of the value of all exports from U.S.A. ; without her cotton export America would have a large debit trade balance ; it is by means of her cotton export that America pays for most of her coffee, rubber, tin, rice and other imports. If America cannot compete with her cotton in the world market, her commercial and financial structure is likely to suffer enormously. If this is taken far enough, she will then be able to build up her cotton export trade again, but during the process her population will pass through a period of unparalleled poverty, misery and suffering.

* * * - *

Since writing the above the American Government issued a statement on August 30 to the effect that the Commodity Credit Corporation would loan to cotton farmers sums on the following bases :—

On $\frac{7}{8}$ in. Middling or better	..	9 cents per lb.
On $\frac{3}{8}$ in. ,,	..	8 ,,
On $\frac{7}{8}$ in. under Middling	..	7 $\frac{3}{4}$,,

No loans will be made on $\frac{7}{8}$ in. cotton or longer in staple, which is of untenderable grades, nor upon cotton of $\frac{3}{8}$ in. under Middling.

The loans will bear interest at the rate of 4 per cent. and mature on July 31, 1938. To be eligible for loans, cotton must be stored in warehouses approved by the Commodity Credit Corporation, and a condition of each loan is that the producer borrower agrees to participate in and comply with the 1938 acreage reduction programme.

The Government programme provides not only for loans but also for compensation payments to cover the difference in price between the price at which the farmer sold his cotton and 12 cents with certain reservations. No more than 3 cents a lb. will be paid in connection with these adjustment payments and will be calculated from the average of the ten Southern markets' price for Middling $\frac{7}{8}$ in. cotton. These payments are only to be made to growers who co-operate in the Government cotton acreage reduction programme for 1938 and they will not be paid on more than 65 per cent. of the base production of the growers unless the funds at the disposal of the Government for this purpose permit payments of a larger percentage.

The term " base production " is stated to indicate a total of 16,150,000 bales for the entire belt, so that if growers, whose base production totals 65 per cent of the total base production decide to co-operate in reducing acreage next year in order to qualify, the number of bales upon which the Government will make these differential payments would total just over 10,500,000 bales.

Adjustment payments of 3 cents a lb. would only be necessary when the ten spot markets' average price is 9 cents, so that providing the price does not fall below 9 cents, the Government will not be called upon to pay the full amount. In consequence, therefore, the percentage of the base production may easily be raised a little higher.

It appears that cotton growers will have to sell their cotton before obtaining a basis for these adjustment payments and also they will have to prove their co-operation with the Government in the 1938 acreage reduction programme. Therefore, growers who obtain loans under the previous part of the programme will have to withdraw their cotton from stock, pay off the 4 per cent. interest and sell their cotton before July 1, in order to obtain their adjustment payments.

It is the official view that the new loan and subsidy programme will not interfere with the flow of American cotton into export channels ; in other words, American cotton is open to competitive bases with foreign growths, provided, of course, the world price for cotton does not make a substantial decline from present levels. Secondly, it is not thought by the trade that a large part of this crop will be placed under loan stocks. At the present time practically all cotton which equals Middling and $\frac{7}{8}$ in. or better should be sold in the open market, for there is no advantage for the cotton farmer to obtain a loan upon it. The same may also be said of cotton of growths lower than Middling and of $\frac{7}{8}$ in. staple or better.

Therefore, the question is how many cotton farmers will agree to reduce their acreage next year in order to obtain their adjustment payments on this present crop ? This part of the programme is certainly attractive, and should a large majority of the cotton planters yield to the temptation, it will mean that the acreage next year in the American cotton belt may be appreciably reduced.

The Government has not yet formulated a programme of cotton acreage reduction for next season but has promised to do so during next Session of Congress which opens in January. No doubt market prices and world prospects of cotton consumption will be taken into consideration when the amount of reduction is decided upon.

FALSE PACKING

During my tour through the whole Belt I continually discussed the question of False Packing with cotton men and Government officials. I found that the ground had been well covered beforehand by the meetings of ginner and farmers which had been organised by the Department of Agriculture as a result of the report of Mr. Fred Taylor, who had prepared the samples he obtained in European mills in boxes similar to the cotton standards boxes, and which were being exhibited throughout the Belt. Several of these meetings were given each week at one cotton town or another prior to the ginning season, and I feel sure that a great deal of good can be the only result from this work. I attended one of these meetings myself at Austin, Texas. The meeting was attended by ginner in neighbouring counties, and after the ginning expert had spoken condemning the practices of false packing and poor ginning, I was asked to address the gathering upon the effects of false packing upon the spinner, and I may add that what I had to say was received with welcome. The vast majority of the ginner are just as anxious to stamp out this malpractice as are the spinner, for it brings the good ginner into disrepute and makes for unfair competition.

The Government has evolved a new marking system for cotton bales, which consists of an oval disc about three inches long and two inches wide stamped out of fairly thick iron and heavily coated with zinc. This disc is mounted loosely upon a piece of strong iron wire at the other end of which is a loop. This marker is placed in the bale with the disc outside the bagging and the wire and loop inside the bale, the loop holding the whole rod firmly inside the bale. The disc will have stamped upon it the ginner's licence number, the state in which ginned, the crop year and the number of the bale. The reason why the disc is made of such strong metal is that the Government wish them to survive any fire in which the bale may be destroyed as a number of frauds on insurance companies have taken place in which false claims for destroyed bales have been made. During the whole of my journey through the entire Belt I only met two people (merchants) who opposed the introduction of this marker. Ginners were all in favour of it and even merchants in irrigated cotton zones stated they will be pleased when a law legalising this marker is passed, for the reason that their best cotton is all sold as "Delta staple" or "Texas Special Staple" to spinners who object to irrigated cotton. One merchant objected to the marker for the reason that he shipped Mexican cotton from South Texas ports as Texas staple. As he said, "it will put a stop to a nice little profitable business."

The United States Department of Agriculture has been sending out some bales from a few gins with these markers attached and with a card inside the wrapping asking the spinner to return the card with any remarks he may wish to make. A number of cards have already been returned from European mills with no objections. There is no possibility of the marker being thrown into the opener by mistake as the rod passes through the bale covering. Spinners who find these markers in their bales should return the card to the United States Department of Agriculture with any remarks they may have to make in connection with the marker.

Reference should also be made to a new bale tie which Government officials have developed; this is composed of a strong wire with a self-locking hook.

This new tie is considerably lighter than the old fashioned band at present used on high density American bales, no buckles or studs are used, and it is a step forward towards the net weight contract. Besides being lighter, it is also cheaper, but no details of the same are yet available as it is only at present in an experimental stage and not in general use.

It has been decided by the United States Department of Agriculture to send Mr. Fred Taylor to Europe this autumn in order to continue his investigations into the question of false packing.

IMPROVEMENT IN COTTON QUALITIES

Among the resolutions adopted at the Seventeenth International Cotton Congress, held in Milan and Rome in 1935, was the following referring to the deteriorating quality of American cotton :—

“The Congress directs the attention of the United States Government to the gradually deteriorating quality of American cotton, which is undoubtedly one of the reasons for the diminishing consumption of such cotton.

“In recent years the Governments of other cotton-growing countries have concentrated upon and succeeded in improving the quality of their crops to the advantage of both spinners and growers alike, and this Congress is of the opinion that the quality of the American cotton crop demands the most urgent and immediate attention on the part of the United States of America if they wish to maintain their position in the markets of the world.”

As soon as I arrived in Alabama, I was met with the phrase “Better seed has been planted this year.” The same held true in Louisiana, Texas, Oklahoma and in the East, in fact, almost everywhere I went.

The supply of cotton planting seed in America is left to individuals or corporations and is not supervised by the Government as in the case in Egypt, Brazil and a few other countries. The farmer makes his own choice from what is offered to him by cotton seed breeding firms, unluckily, there are a few who use arguments to sell their planting seed—while they may be true, are misleading. For instance, a certain short staple variety obtained huge sales for the reason that the breeders claimed a very high percentage gin out-turn at the gin, i.e., high percentage of lint to seed. The gin out-turn is certainly high, but the yield per acre is not so good as many longer staples. Moreover, the price received by the farmer for the short staple proved decidedly less than for other cottons. Nevertheless, the advertising methods pushed the sales of this seed to such an extent that one now finds it scattered in almost every state of the Cotton Belt, a short staple cotton which has crossed and recrossed with the other older, superior cottons.

Most planters used to buy their planting seed from the ginner where the seed from all farmers is mixed indiscriminately, and one can imagine the mongrelised mixture one would obtain in a district where this short cotton had been grown, perhaps by only a few planters. If one farmer planted a good strain, the resulting seed would be spoilt by his neighbour planting this inferior gin run short staple seed.

Before the planting period in both 1936 and 1937 Government officials, ginner, cotton seed oil crushers and cotton merchants who could visualise that America may lose her markets because of this decline in quality started a campaign for the planting of improved cotton seed. Newspapers, the radio and lectures were utilised to spread the propaganda among cotton planters for the planting of improved cotton strains. Better picking, uniformity in grade and staple were all dealt with and the farmers were shown that by producing a short staple they would have to compete with low-priced cotton from China, India, etc.

In the annual report of the United States' Secretary of Agriculture for 1936, on page 663, appeared the following:—

“It would seem that if these export markets are to be regained, it will be necessary for the United States to produce better cotton than

is grown anywhere else in the world. It seems necessary, therefore, not only to continue to improve the staple length and uniformity of American cotton but to breed into the new strains other quality factors that will enable the United States to compete successfully with other countries."

The Governmental Experimental Stations are certainly doing an enormous amount of valuable work in creating new and improved varieties of cotton, these improved varieties are sold or distributed to cotton seed breeders, and there the Government interest in these varieties seems to end. In the next field to this improved seed may be planted a poor variety which will immediately cross fertilise with it or become mixed in the gin and reduce the value of the resultant seed for planting purposes. The work and expense of the Government breeding stations is almost entirely lost for the simple reason that there is no law controlling supervision over cotton planting seed. I am told that it would be impossible to introduce such a law in a country as democratic as is the United States, where every farmer should be free to plant what he wishes. Nevertheless, it has been found possible to pass a law prohibiting the actual growth of cotton in those districts infected by the pink boll worm, and even today when one travels from Brownsville towards San Antonio by car, one is not allowed to transport cotton plants or cotton seed, just in case they may be infested by this pest. The improvement of the quality of the American cotton crop is far more important than the localisation of the pink boll worm and the Government would be justified in the supervision of all cotton planting seed. Even if the pink boll worm did become established throughout the Belt, cotton would still be grown for export, but if America allows the quality to deteriorate through its inactivity and indifference to the plague of inferior seed in the midst of good quality cotton, while other countries are continuing to improve their commercial cotton strains, then the American belt will gradually lose her export markets. If the Federal Government cannot legislate in this question, then those States which value their export markets should do so.

One of the most important experiments undertaken at present on Government breeding stations is the creation of a very fine fibre cotton of medium staple. It has long been known that the fineness of fibre is as important in yarn strength as is length of fibre, and some time ago a very fine fibre cotton, but which was very short, was found growing on the Hopi Indians' reservation in Arizona. Government botanists have succeeded in crossing this variety with Acala and the first cross displays a high degree of the expected fibre fineness. The second year's crop of self-fertilised plants is now being cultivated, but it will be at least seven or eight years before the new type is pure enough for distribution to the cotton breeders.

The original Hopi cotton, although very short, less than $\frac{1}{2}$ in., has been spun into yarn for which normally $1\frac{1}{4}$ in. is required commercially. The yield per acre is low and the plant sheds many of its bolls. The limited supply of fibre from the first cross has yielded staple of uniform length of $1\frac{1}{8}$ in., on the other hand the yarn spun from this cotton is estim-

ated to be as strong as yarn from $1\frac{1}{2}$ in. ordinary Upland cotton. The fibre requires less twist than other fibres of equal length, a quality that will help to cut the spinning cost. From the growers standpoint this new variety of Acala \times Hopi would help to reclaim the market abroad against other competing producers.

As a result of the campaign for improved quality seed, local committees have been set up in many cotton growing communities with the object of improving the cotton produced. In fact, in many districts one variety cotton communities have been organised, only one variety of cotton will be grown in these and it is intended that the seed produced by the members of these, improvement committees should be saved for planting each year, something on the lines adopted in California. Special gin days have been arranged when the local ginnery will only gin members' seed, and efforts must be made by the ginnery to keep the seed as pure as possible by cleaning out the gin machinery. These gin days are usually arranged for a Sunday, and the seed from the first two bales run through on the gin day is destroyed and is not used for planting, in case seed from other cotton has been left in the gin.

I found that Texas had made most progress with one variety cotton communities. Chiefly the Acala variety has been adopted as this has been found one of the best varieties to grow on the Blackland Belt, which is the best cotton growing district in that state.

Cotton men are not yet satisfied with the progress made and endeavours are being made to increase the number of these communities, with the hope that the whole of Texas will be divided into these one-variety communities. In the arid section of Texas, such as in the Panhandle and West Texas, the climate would not be suitable for Acala; it has been suggested that a shorter variety should be grown there. One point put to me by a Government official was the ginneries which ginned seed eventually used for planting in the following year should be licensed for this purpose and should gin no other seed at all.

The deterioration in the quality of American cotton has been partly due to the ignorance of the farmer as regards grade and staple and the premiums quality cotton will command in the market. If he grew $\frac{1}{2}$ in. cotton he was very surprised to receive a low price as compared with his neighbour who produced longer staple, for in the farmers' views cotton is cotton without any reference at all to the length of staple. However, the Government has organised grade and staple schools for ginneries in one variety cotton communities with a hope that the ginneries will pass on the information learned, to the farmers, and that they will try to induce the farmer to produce better quality varieties. When a district obtains a poor reputation for short cotton the buyers penalise even good cotton bought there, by buying at "hog round" prices so that even a grower with good staple receives a poor price.

A new law has recently been passed whereby it will be possible for a one variety cotton community to have every bale ginned within the community graded by a Government classer, so that the farmer will realise why his cotton is commanding a premium over what he used to

produce in previous years. This service is really an extension of the grade and staple reports undertaken by the Department of Agriculture during the last few years.

Other varieties of cotton adopted by these communities are Stoneville, chiefly in Louisiana and Alabama, which has a staple of $1\frac{1}{32}$ in., Missdel, this has been taken up in the Delta more than Acala and Stoneville. The extra cost of planting these superior strains amounts to the insignificant sum of 4 cents per acre.

Arrangements have been made by cotton seed crushers whereby the farmer can exchange his ordinary seed for pedigree or registered seed, but here again lies a danger that an unsuitable variety to the locality might be distributed by a well meaning organisation.

A strong campaign has been carried on throughout Texas and Mississippi against the notorious Half and Half, a $\frac{3}{4}$ in. variety, and the results of comparative tests have been published by agricultural colleges showing the advantages of other well-known varieties, such as Stoneville, Acala, etc., over Half and Half. In an experiment in Mississippi on the farms of seven different cultivators covering the last eight seasons, comparative tests show the financial disadvantage of Half and Half. The average monetary return per acre for this variety was \$51.02 as compared with a selection of other varieties as follows :—

		Length of Staple	\$ per acre	Yield of Lint per acre
		in.		lb.
Half and half	.. ..	$\frac{3}{4}$	51.02	410.0
Stoneville 2a	.. ..	$1\frac{3}{32}$	75.34	463.5
Stoneville 5	.. ..	$1\frac{3}{16}$	89.42	532.3
D and P.L. 11a	.. ..	1	81.47	493.5
Dixie 14 Strain 5	.. ..	$1\frac{1}{8}$	81.57	514.0
Delphos 531a	.. ..	$1\frac{3}{16}$	80.03	456.3
Missdel 6	.. ..	$1\frac{1}{8}$	77.97	449.0

In spite of the fact that the gin out-turn for Half and Half is higher than any other variety, the yield per acre of lint and the price return per acre is much lower than any other of the above longer staple varieties.

IMPROVEMENT IN GINNING

Not only is the Department of Agriculture working intensively upon the improvement of varieties of cotton planted but also it established an experimental ginning station at Stoneville, Mississippi, some years ago, where a great deal of valuable research work into ginning methods has already been undertaken. This station has already shown that the average ginner either runs his saws too fast or feeds his cotton too rapidly into the gin with the consequence that the saws have to cut their way through a tight roll of seed cotton, causing gin cuts and naps. They have also been able to prove to the ginner the monetary losses sustained in the quality of the staple by ginning damp cotton. At present, work is being undertaken to arrive at the best saw speeds, tightness of roll or rate of feed for the various staple lengths of fibre—for shorter cotton may safely be ginned at a higher speed than the longer staples.

Some very useful work is still being undertaken in research on the pre-ginning machinery, namely the seed cotton cleaners. It has been proved that metal spikes in the rollers of the pre-cleaners injure the fibre (when first these machines were introduced, spinners declared that the "bloom" had been taken out of the cotton and that the strength suffered, but this idea was ridiculed at the time by American cotton people) and in most of the cleaners now on the market these spikes have been replaced by fibre brushes. Ginnery manufacturers are watching the experiments at this station very carefully and where possible any suggestions made are taken up.

A step in another direction is the standardisation of saws and ribs. The station experts have found out the correct shape for the teeth on the saws, number of teeth per inch, etc., which although apparently a minor detail is very important not only in output but in so far as incorrectly cut saws have more tendency to damage the fibre.

In each state there has recently been appointed by the Department a ginning expert, whose work is to give advice to ginnermen on the best methods of ginning and maintenance of ginneries. This expert will keep in touch with the work being conducted at the station and transfer the knowledge thus gained to the cotton ginnermen.

I was informed that gin manufacturers have never been so busy before, for ginnermen are reported to be replacing their old cleaning machinery by modern types and also replacing their saws to a greater extent than ever before. The number of new saws sold by manufacturers this season is said to be equal to the total sold during the last five years together.

What with the general improvement in the varieties of cotton planted, the excellent growing weather during June, July and August and the anticipated improved ginning establishments cotton men throughout the Belt are anticipating a much better character staple for this season and are hoping that the spinners of the world will take advantage of the improved quality.

ONE VARIETY COTTON COMMUNITIES

The system of public ginning has done more to harm the quality of American cotton than any other factor in the chain of all the phases of cotton production. In the post Civil War period many of the large cotton estates were well isolated and grew a single variety of cotton from their own seed and ginned the cotton on their own gins, so that no mixture of seed of different varieties took place. The development during the 50 years after the Civil War brought along with it the system of public ginning, and the small farmers planted varieties which appealed to them for various qualities and reasons. Then came what is termed in America, cotton seed "bootleggers," unscrupulous cotton seed salesmen who sold "gold bricks" to the farmers in the form of "wonder" cotton seed, claiming all sorts of exaggerated qualities, yields and profits to the planter. The public gins' main object is production, and the gin owners thought no more of mixing the various varieties of seed than they did

of the quality of the fibre they turned out, under the continual urge to obtain a high production with saws running as fast as their engines could turn. If a farmer asks the ginner for his seed, he will always get some of the seed brought to the gin by the farmer who arrived at the gin either before or after him, as it is impossible to give each farmer his own seed only. This mixture when planted will cross fertilise and the damage to a good strain is done ; consequently, there now remains no incentive to a farmer utilising the public gin to pay the extra cash for superior seed. To demonstrate to what extent mixing does take place, one experimenter dyed all the seed left in the gin after a bale had been ginned, and it was found that the dyed seeds continued to appear in gradually decreasing numbers at the end of 30 minutes, and some were found to come out in the seed conveyer even during the ginning of the third bale after the dyed seed had been put into the gin.

There are hundreds of different varieties of cotton in the Southern States, many of the old varieties have disappeared, but new varieties, or rather new names, are being brought out each year and advertised as valuable crop producers, only adding to the general mixture. A dozen good varieties would be far better than the hundreds, mostly of inferior quality, at present in use.

There seems to be a general idea that cotton seed is bound to degenerate if grown in the same place year after year, but the degeneration that does take place is merely due to the intermixing with other inferior varieties, either at the gin or in the field. If this were not the case, how can seed breeders maintain their stocks of cotton seed at the same quality or even improve on it? Yet there still remains the superstition of " changing the seed " among most cotton producers and this belief is fostered by seed dealers, ginnermen and oil millers, who supply car loads of " new " seed to the growers, regardless of the fact that they are only adding to the general mixture which goes on at the gins and in the fields. It does not matter how superior in quality this new seed may be, there is not the slightest hope of retaining its qualities by mixing it with inferior types. The only possible method of so doing is to put 100 per cent. of the community using any one gin on to one and the same variety and strain, and if these conditions are maintained it will be found that the variety will not need changing, provided that farmers who are near the boundary of the community do not plant their cotton near to non-co-operating cotton growers. In order to overcome this danger of deterioration of quality there have been formed during the last few years a large number of One Variety Cotton Communities ; in Texas especially has this movement spread under the guidance of Government officials, ginnermen, merchants and cotton oil men.

As is usual it is quite impossible to enrol all the cotton planters in the district into a one-variety community plan during the first year of its existence, and such an organisation starts in a small way with one ginner and a handful of farmers. The organisation's first object is to decide on the most suitable variety for the district and then to obtain from the State Experimental Station or buy from a reliable breeder a sufficient stock

of this seed to form a nucleus and plant on an increase plot when sufficient seed of this progeny will be available to distribute to all members. The ginner who works in co-operation with the community will gin this certified seed separately, after having thoroughly cleaned his ginning machinery. In the second year sufficient seed should be obtained to plant 1,800 acres. This has been the experience of a community in Georgia; two gin days were found necessary in the second year and the farmers were so pleased with the plan and so many new members joined up that in the third year the gin was declared a one-variety gin and a notice was put up to that effect outside the gin, and no other variety was permitted to be ginned there. Even in the second year the farmers received \$2.50 per bale extra, or 50 points due to the improved quality and large shipments of even running cotton. In the third year farmers received premiums of \$4 and \$5 per bale and also the increased yield per acre has resulted in higher individual profits. Now the community organisation is actually selling planting seed to non-members in other communities. Warehouses have been built to eliminate country damage; the whole community crop is sold through the organisation at a better price by reason of a large running lot. The spinners receive a better character cotton. It is possible for closer co-operation between the ginner and the grower. The ginner can run his gins at the same speed all through the season as he knows what staple cotton he will receive. The ginner refused to gin damp cotton, which action has eliminated gin cuts and rough cotton and saved the ginner extra work. Cotton buyers go to the community and not the community to the buyers, for there is keen competition to obtain this cotton.

There have been established during the last four years a large number of One Variety Cotton Communities throughout the whole of the cotton belt, and in 1936 it was stated that there were 115 of these communities in various stages of development in the States, covering an area of more than one million acres. Half a million bales of cotton of one inch to $1\frac{1}{8}$ in. were produced in these communities and in nearby areas from seed supplied from the one variety community organisations.

According to estimates of the organisers of one variety cotton communities, the average increase in yield in these community areas was 40 lbs. of lint per acre and the average premium received by the planter for his cotton was about \$5 per bale, making a total extra net income of \$6.93 per acre for the increased yields and premiums.

The more important advantages that experience has shown are available to growers through these one variety communities may be summarised as follows :—

The cotton produced is of a uniform high quality in larger commercial quantities, for which there is always a good demand. It is the only practical way to develop and maintain local supplies of pure seed at a popular price. It discourages the introduction of seed of miscellaneous untried varieties. Mongrelising of varieties in the fields and the mixing of seed at the gin is avoided. Improvements result in yield, quality and uniformity of the lint. Growers problems in cultural methods, fertilisers,

disease and insect control are more effectively worked out by the organisers. A uniform wage for cotton picking is easier to establish with one variety of cotton. Better adjustments of ginning machinery can be maintained when only one variety of cotton is grown, with the consequent improvement in the quality of the fibre. When only variety is grown and ginned, bales cannot be plated with shorter fibre in the centre of the bale. The gin can be worked co-operatively by the growers, which would bring along with it lower ginning costs, or at least the profits from ginning would be distributed eventually among the farmers. All surplus stocks of seed can be sold to non-members of the community. The community can establish a reputation for uniform high-quality cotton, thus attracting large buyers or mill representatives. Growers are able to obtain current premiums for staple length, which are very seldom obtained by individual farmers. The bales produced by a community may be identified by an identification mark or trade mark to prevent non-co-operating farmers in neighbouring territories selling their inferior cotton in the community and thus jeopardising the community's reputation for good cotton. If the community's bales are identified or bear a trade mark, certified samples may be taken at the gin and later sampling will be unnecessary, to the vast improvement in the appearance of the bale when it reaches the spinner in the various markets of the world.

SEA ISLAND COTTON

The rehabilitation of Sea Island Cotton was attempted in Madison County, Florida, by the W.P.A. (Works Progress Administration) in 1935 with such successful results that the work has now been extended to all the cotton growing sections of the state and also to Georgia, in spite of the fact that the authorities could not recommend the general planting of this long staple cotton. The W.P.A. entomologists evolved an improved method of weevil control and after a few preliminary experiments it was discovered that by applying poisoned syrup mixtures in the afternoons while the cotton plants were dry and the weevils thirsty, practically all the adult weevils in the field were killed within a few hours. With this knowledge, experiments were undertaken on 30 farms in 1935, and it is claimed that all weevils which had survived the winter were killed by the afternoon application of poisoned syrup. In pre-weevil years the yield per acre of Sea Island cotton in Florida amounted to from 600 lb. to 1,400 lb. of *seed cotton*, i.e., 200-466 lb. *lint* per acre. In 1935 yields on the better soils averaged slightly better than 250 lb. lint per acre and in one instance 13 bales were produced on 12 acres.

The "Afternoon Method" of applying weevil poison is stated to be simple and inexpensive. The syrup is applied by pushing a mop through the tops of the cotton plants—one man can poison 6 to 8 acres in an afternoon. The poison applied is $1-1\frac{1}{2}$ lb. of calcium arsenate mixed into two quarts of water, to which a gallon of sugar syrup is added after the water and calcium arsenate has been thoroughly stirred. A gallon and one half of the mixture is sufficient to mop an acre in one application. The cost of poison and labour does not exceed 35 cents per acre

per application. Four to six weekly applications are usually required. In three hours, it is said all weevils will be killed unless rain falls in the meantime.

The W.P.A. and the State Department of Agriculture are satisfied that the present strains of Sea Island cotton properly fertilised and cultivated will produce a satisfactory crop of cotton sufficiently early to escape damage from the mid-summer migrations of the weevil, provided the cotton is planted early (March) and all the overwintered weevils are poisoned as they come out of hibernation. The state experiment station is carrying out further experiments into fertilisation, spacing of plants, soil moisture studies, best planting period, etc., and it is confidently expected that within a few years 25,000 bales of Sea Island cotton will be produced in Florida and Georgia.

The 1935 crop was low grade cotton, but sold for 25 cents per lb. and the price received for high grades in 1936 was as high as 32 cents.

The Crop Reporting Board estimated that the Sea Island crop in Florida and Georgia this year will total 5,300 bales of 500 lb. or just over, 6,600 running bales as the Sea Island bales weighs 400 lb.

NAPS, NEPS, MOTES, AND SEED-COAT FRAGMENTS

Under the above title a publication has recently been issued by the United States Department of Agriculture with the object of clearing up the confusion which exists in regard to the use of the proper terms for naps, neaps, motes, and seed-coat fragments. For instance, the terms "nap" and "nep" are often used interchangeably; true neaps are not always distinguished from small seed-coat fragments, and the term "mote" is frequently used to denote material not properly considered as "motes."

The following is extracted from this publication and will no doubt be of interest to spinners:—

Naps are more visible when the lint is viewed more or less as a whole. A careful examination of ginned lint shows that the large fibre masses contribute to the general roughness of the lint are not knotted with equal tightness. Some masses resist separation somewhat when the lint is gently pulled apart with the fingers. Other masses, each of which is a slightly twisted or matted clump of more or less parallel fibres, readily separate upon such manipulation. These fibre masses should offer little resistance to the carding machine and therefore should produce little in the way of broken and injured fibres and visible waste.

In the laboratory study of ginned lint, naps are considered to be only those larger fibre tangles that probably would offer resistance to the action of the carding machine. Thus, large masses of fibres that do not become separated when the lint is gently pulled apart with the fingers are considered naps. But it must be emphasised that there is no sharp line between those fibre masses that are rather arbitrarily called naps and those more loosely knotted fibre masses that are not so called. At present, it is purely a matter of personal judgment whether borderline cases shall be called naps.

A very nappy condition of the lint is generally considered to result from bad ginning practices, such as ginning seed cotton when it is too wet or ginning with too tight a seed roll. Under such conditions long-staple cottons tend to nap more than short-staple cottons.

NEPS

The distinction between naps and neps is based on difference in size. Neps, in contrast to naps, are very small tangles of fibres. They are not easily seen in cotton lint viewed as a whole, but when the lint is pulled out in small tufts, as in stapling, neps become conspicuous.

Spinners consider neps one of the most troublesome imperfections in cotton. Neps can be found in the products of all the various manufacturing processes and are most noticeable when the cotton is spread out in the form of a web or drawn out into yarn. They are easily seen even after the yarn is woven into cloth. They are particularly objectionable in dyed material because frequently they do not take the same shade as the rest of the yarn. Sometimes they dye darker, and sometimes lighter than the rest of the material, making them appear as specks against their background.

Neps vary in size, and they merge into naps. Thus there are tangles that are difficult to classify and that might be considered either large neps or small naps. In the laboratory of the Bureau of Agricultural Economics, neps are considered to include all definite fibre tangles up to those that are twice the size of a pinhead. Larger tangles are classified as naps.

Neps can be found in varying numbers in most saw-ginned lint. Long-staple, fine cottons are generally considered to be neppier than short-staple, coarse cottons. It has been demonstrated that thin-walled fibres tend to tangle more readily than do thick-walled, more mature fibres. Consequently, cottons that have a high percentage of thin-walled fibres are likely to be neppier than those that have a high percentage of thick-walled fibres.

In grading cotton naps and neps are considered as elements of poor ginning preparation, but I was informed by a cotton breeder that neps were also hereditary as certain strains showed no neps at all, whereas others were very neppy indeed.

MOTES

The term "motes" is used rather loosely in the cotton industry. In its most restricted use the term is applied to aborted ovules and seeds. Motes also have been defined by some writers as immature seeds. Large seed fragments, or the ends of seeds occurring in the lint, are occasionally referred to as motes, and the small seed fragments are often called "bearded motes." Some ginners describe as "motes" all the material that falls into the mote box or conveyor during ginning. This material may include immature seeds, fragments of mature seeds, naps and other fibre, bits of leaf, hull, and shale, and other foreign matter. Certain wastes developed during manufacturing are likewise described as "motes," although true motes may form only a part of such waste.

In the laboratory analysis of ginned lint, the undeveloped seeds in the lint have been termed *motes*. These structures vary considerably in size. The smallest ones each consist of a shrivelled bit of material—the remains of the aborted seed itself—to which very short fibres are attached.

The largest have long fibres that are usually very thin-walled and that in some instances appear to be nearly as long as the fibres of mature seeds. The seed portion may be fairly large, is usually rather light in colour, and is easily crushed.

Motes constitute a part of the waste discarded during spinning. Some motes are crushed during ginning and carding, and their fragments may become incorporated in the yarn.

Motes and mature seeds are the sources of these fragments. Because of their brittleness, motes frequently are crushed during ginning. The resulting fragments may remain together in the lint as one clump; or they may become separated, some of them being removed with the seeds and through the moting process, others becoming more or less scattered throughout the lint.

The fragments of mature seed (and perhaps fragments of some of the largest motes) are produced by at least two different processes: (1) the cutting of the seed by the teeth of the gin saw, and (2) the pulling away of the blunt end of the seed during the ginning process. The seed-coat at the blunt end of the cotton seed ruptures rather readily. This portion with its group of long fibres may be broken off during ginning, and the resulting fragment appears in the lint as a fibre clump that frequently has a very nap-like appearance.

Seed and mote fragments affect the quality of ginned lint. Not only are these fragments important from the standpoint of waste, but the small fragments, frequently called “bearded motes,” cause trouble for the manufacturer. They cling to the lint tenaciously and are exceedingly difficult to remove. If large numbers resist removal and pass into the yarn, they give it a rough and dirty appearance. They may still be present after the yarn is woven into cloth and appear as undesirable specks on the surface of the fabric. Moreover, in the dyeing and finishing of the fabric, the fibres attached to these fragments may present the same problems as mentioned in connection with neps.

COST OF PRODUCTION

The Department of Agriculture's latest figures on cost of production in the Cotton Belt show that the actual cost of production for the whole of the United States averages 10.5 cents per lb. This figure refers to 1935 and includes all costs, even the rent.

The table quoted overleaf is the actual table issued by the Department.

The highest cost of production is given as 12.8 cents in Oklahoma and the next highest is Texas with 12 cents, but these high average figures are probably due to the short crop produced in those states in that year. The lowest state figure is 9.27 cents per lb. in South Carolina.

According to figures I collected in various sections of the Belt myself, I found that during the present year these figures quoted opposite are a little too high, for in Texas I was informed that the average cost of production for the state will be roughly 7 to 8 cents per lb., but figures I received in the East on the cost of producing cotton in the Carolinas were in excess of 9.5 and 9.2 cents for North and South Carolina. I was informed that the cost of production in the Carolinas was more in the neighbourhood of 11 or 12 cents in 1937 due to the increasing cost of living and the higher price of fertilizers.

The table opposite subdivides the whole Belt into types of cultivation, in the irrigated sections the Department states that the cost of production (in California, Arizona, New Mexico and Texas) is 10.3 cents per lb., but as previously mentioned I was informed in California that the cost of production with an average yield per acre in that State is about 6 cents per lb., with a tendency to increase owing to the higher cost of picking wages.

There seems to be no doubt about the question that the tendency at present is for the cost of living to rise in the United States, most manufactured articles are increasing in price and so are most of the important foodstuffs. This has its effect on wages, which increases the cost of production; although wages do not have much influence on the cost of production of cotton, for the simple reason that only 55 hours of work are normally put into the production of cotton per acre. This refers to Texas. In other parts of the Belt, the average number of days of 8 hours worked put into the cotton crop varies from $8\frac{1}{2}$ to $12\frac{1}{2}$ days per acre.

August, 1937.

N. S. Pearse.

Table 2.—Cotton: Estimated Cost of Production, by Selected States and Regions, 1935.¹

State and region	Acre- age har- vested	Produc- tion of 500- pound gross- weight bales	Aver- age yield per acre ²	Gross cost per acre						Net cost of lint							
				Pre- pare and plant ³	Culti- vate and hoe	Har- vest ⁴	Ferti- lizer and ma- nure	Seed	Mis- cella- neous ⁵	Land rent	Total	Credit per acre for cotton seed	Per acre		Per pound		
													Includ- ing rent	Exclud- ing rent	Includ- ing rent	Exclud- ing rent	
State	1,000 acres	1,000 bales	Pounds	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Cents	Cents
North Carolina ..	930	572	308	418	614	843	619	110	245	343	3798	2923	2317	9.5	7.5		
South Carolina ..	1,362	744	273	360	554	649	444	107	210	388	3235	2511	2073	9.2	7.6		
Georgia ..	2,135	1,059	246	395	539	605	444	106	195	384	2963	2388	1974	9.5	7.9		
Alabama ..	2,243	1,059	236	373	532	554	388	107	188	308	2865	2270	1875	9.6	7.9		
Tennessee ..	730	317	215	448	638	632	245	109	211	352	3145	2527	1947	11.8	9.1		
Mississippi ..	2,644	1,259	238	355	615	617	195	105	242	319	3407	2858	1714	9.5	7.2		
Louisiana ..	1,221	556	228	384	628	652	125	107	225	389	3707	3129	1820	10.2	8.0		
Arkansas ..	2,137	853	200	381	518	518	108	109	211	353	3484	2847	1533	10.2	7.8		
Oklahoma ..	2,318	867	122	308	477	597	107	112	253	434	2882	1947	1253	12.0	10.0		
Texas ..	19,657	2,956	139	286	381	368	223	95	170	257	336	1962	1256	12.0	8.8		
Region																	
Coastal Plain ⁶ ..	4,395	2,227	253	361	540	622	423	100	211	319	407	2983	2311	1904	9.1	7.5	
Piedmont ⁷ ..	2,392	1,210	256	404	597	642	490	104	194	343	450	3234	2534	2034	9.9	8.1	
Eastern hilly areas ⁸ ..	2,478	1,088	220	408	615	562	300	108	188	310	475	2965	2378	1903	10.8	8.9	
River bottom areas ⁹ ..	2,654	1,418	270	362	648	772	73	109	303	362	644	3273	2588	1744	8.8	6.5	
Western hilly areas ¹⁰ ..	4,951	1,331	134	348	504	365	57	101	143	282	412	2242	1872	1460	14.0	10.9	
Gulf Coast, prairie an- d prairie ¹¹ ..	4,793	1,219	129	303	416	347	18	100	143	271	404	2091	1746	1252	13.5	9.7	
Western dry areas ¹² ..	5,068	1,606	158	246	299	436	20	86	210	337	352	1827	1075	903	6.8	5.8	
Irrigated areas ¹³ ..	653	521	399	607	586	1396	29	103	483	1071	1010	5284	4128	3119	10.3	7.8	
United States ¹⁴ ..	26,314	10,620	195	342	491	522	166	99	195	303	400	2581	2045	1585	10.5	8.1	

¹ Preliminary estimates. In computing averages, data were weighted by acreage harvested.² Obtained by dividing the production of lint in terms of 500-pound gross-weight bales by the acreage harvested.³ Includes hauling and spreading manure.⁴ Includes picking and snapping cotton, hauling to gin, and hauling lint and cotton seed to local markets.⁵ Includes miscellaneous labour, irrigation (including water), dusting, picking sacks and sheets, crop insurance, use of implements, use of storage buildings, and overhead.⁶ Includes the lower and upper coastal plain of Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Louisiana, and the black prairie Belt of Alabama and Mississippi.⁷ Includes the rolling and hilly uplands of Virginia, North Carolina, South Carolina, Georgia, and Alabama, which border the Blue Ridge Mountains on the east and south.⁸ Includes Tennessee exclusive of Lake County, the hilly cotton lands of northern Mississippi, northern Alabama, and northern Georgia, and western North Carolina.⁹ Include the principal bottom lands of the Mississippi, the Arkansas, and the Red Rivers.¹⁰ Include the hilly lands of Arkansas, Louisiana, southern Missouri, eastern Texas, and eastern Oklahoma.¹¹ Include the gulf-coast prairie of Texas and Louisiana, and the black waxy prairie of Texas.¹² Include the dry-land areas of western Oklahoma, western Texas, and the black waxy prairie of Texas.¹³ Include the irrigated cotton lands of California, Arizona, New Mexico, and Texas.¹⁴ Include the 16 States of Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Tennessee, Mississippi, Louisiana, Arkansas, Missouri, Oklahoma, Texas, New Mexico, Arizona, and California, which produced 99.9 per cent of the United States cotton crop of 1935.

THE COTTON LOAN AND SUBSIDY PLAN

The following article taken from the *American Cotton Grower* describes in brief the American Cotton Loan and Subsidy Plan :— Farmers who agree to co-operate in a crop reduction programme on cotton for next year are eligible for a loan and price adjustment payment on 65 per cent. of their production from their base acreage, whether they are at present in the Soil Conservation Programme or not.

The maximum loan will be :

9 cents per pound on $\frac{3}{8}$ -inch middling cotton and better ; 8 cents on 13/16-inch middling and better ; $7\frac{3}{4}$ cents per pound on $\frac{7}{8}$ -inch cotton below middling in grade.

No provision was made for loans on cotton of below middling grades of 13/16-inch cotton.

Loans mature July 31, 1938. Cotton to be stored in warehouses designated by Commodity Credit Corporation. Loans to be made available on or before September 15.

The maximum price adjustment is 3 cents per pound on 65 per cent. of the base (more of base if money is available) and all adjustments are to be based on the price of cotton at the ten designated spot markets on the day cotton is sold. Price adjustment to be paid next year after proof of compliance with law to be enacted has been established. The price adjustment is retroactive. Farmers should keep correct records of weight, tag numbers, location of cotton and grade of cotton and all details pertaining to the bale, also date of sale. These will be necessary in order to secure the price adjustment payment.

The price adjustment will be paid on cotton placed in the loan prior to July 31, 1938.

Illustration : A farmer has a base production of 100 bales. He is eligible to loan and price adjustment on 65 of those bales. He sells 65 bales at the current market. . . . 9.31, August 31. If he complies with the Government programme next year he will receive the difference between 12 cents and 9.31, or 2.69 cents per pound, or \$13.45 per five hundred-pound bale.

In a statement to the Press following the publication of the high cotton crop report of October 8, Secretary Wallace said there are many who believe market price is all important and would use Government loans in an attempt to peg the price of cotton. If loans did not hold the price up to the desired level they would have the Government purchase the cotton outright at a fixed price.

Secretary Wallace admitted that loans have their place at times in a constructive cotton policy, but if they are used for any length of time to keep the market price in this country above the prices at which producers in other countries are willing to sell they have two results that in the long run are very bad.

One is that the Government gets a huge supply of cotton, which is difficult to move into market channels without upsetting prices and ruining

the farmer. The other is that while the loan is in effect cotton is prevented from moving freely into export because foreign cotton which is unaffected by any such loans can be had at lower prices.

"Loans do not necessarily make the price," Secretary Wallace told newspaper correspondents following his conference with the President. "Under the 12c. loan programme in 1934, the price of cotton went down in the spring of 1935 to about 10½c. It just makes the price for the man who does the borrowing and he has to pay the carrying charges."

He pointed out that the fallacy of putting price foremost is that those who believe in that neglect the factor of income—what a farmer has to spend at the end of the cotton season depends not alone on price but on how much he can sell at that price.

He would have the farmers forget "price per unit" and look more to ultimate income from production geared to world consumption and with due regard to what the world is willing to pay for the staple, it was indicated.

He said that the supply of American cotton is the predominant factor in the world price of all cotton. The price of foreign cotton moves in unison with prices of American cotton. In trying to affect cotton prices through control of domestic supplies, he believes, we are really trying to influence world supplies and prices. With world conditions as they are, he added, American cotton products apparently can obtain high prices only if they are willing to surrender their export outlets to foreign producers and go on a domestic basis.

LOAN PLAN BROADENED

The Commodity Credit Corporation recently announced changes in the 1937 cotton loan programme designed to bring in under it lower grade and staple cotton.

Action was said to have been taken by the corporation to meet a flood of requests from West Texas, West Oklahoma and Northern Alabama where short staple and low grade cotton is produced that was not eligible for any loan under the original programme.

The three changes in the loan programme were announced as follows :—

"1. The establishment of a new loan rate of 8½c. per pound on cotton 7⁄8-inch and above in staple and strict low middling or equivalent in grade.

"2. Establishment of a new loan rate of 7 c. per pound on cotton shorter than 7⁄8-inch, grading strict low middling or equivalent in grade.

"3. Establishment of a new loan rate of 6 c. per pound on cotton shorter than 7⁄8-inch, low middling or equivalent in grade."

A revived schedule of loan values for each eligible grade of cotton under these three new classes is being worked out by the corporation and is expected by officials to be ready shortly.

"While the programme already announced covered approximately 96 per cent. of the crop, a considerable portion of the cotton produced in limited areas is ineligible for a loan at the rates previously established," the corporation said in its announcement. "The objective of the modifications is to afford uniform protection to all producers throughout the belt and to enable them to market their cotton in an orderly manner."

Meanwhile, investigation at the corporation developed that cotton has been moving in under the loan programme "fairly slowly." It was estimated that only 50,000 to 60,000 bales have been pledged so far.

Officials of the corporation explained the slow movement was due to the mechanics of the new loan programme. They said that most warehousemen are insisting upon classification of cotton by the Bureau of Agricultural Economics, United States Department of Agriculture, before they will accept it for loans. Under the new programme warehousemen are held responsible for grade and staple of cotton accepted for loans.

LOAN INFLUENCES IN COTTON

Hedge selling in the cotton market after running up to a peak early in October has slackened off lately and has recently been comparatively light. The chief reasons for the diminution in hedge offerings are the Government loan, which has caused farmers to hold cotton back in the interior until they decide whether to sell or borrow on their crop, and showery conditions in the belt recently which have interrupted picking and ginning. With prices up somewhat from the recent low point, and with the development of more favourable weather, a larger hedge movement may soon be witnessed.

Whether the peak for any week of the season has been reached yet or not is a moot question. Sales at Southern markets at no time this season have been proportionate to a real movement of so large a crop. Ordinarily one might expect the peak movement and heaviest hedging against the domestic crop around this time of year, but the indecision of growers whether to sell or borrow, and the feeling among many of them that the Government might do something more for cotton, suggests that hedges may be spread over a much longer period than is usual this year.

As a matter of fact, hedging of the American crop on the New York exchange could easily run in heavy volume this year up to the time when the principal foreign crops, estimated at a total of more than 20,000,000 bales, begin to move and to produce hedge pressure in the New York ring. Already large straddles long New York and short Bombay exist anticipating the movement of the Indian crop in December or January, and as the Indian crop moves it may be reasonably assumed that such straddles will be lifted transferring the weight of Indian's movement to the New York ring.

ANOTHER PROCESSING TAX FOR AMERICAN COTTON?

The special session of the United States Congress, which has been convened for this month, will have to consider the draft of the new Farm Bill, including the "ever-normal granary" scheme of processing taxes on wheat, cotton and rice. The Bill is built largely round the Soil Conservation Act, and the proposed processing tax in the case of cotton is 3 cents per pound. It is proposed to place compensatory taxes on competitive products.

CURBING SPECULATION IN U.S. COTTON MARKETS

The *New York Journal of Commerce* reported recently that, moving to meet the alarmingly high cotton crop estimated for this year, Secretary of Agriculture Wallace has conferred with President Roosevelt, with the result that the country's cotton exchanges will take speculative accounts in the commodity out of the credit class through establishment of minimum margin requirements, effective January 1.

The Secretary said that at his suggestion the Board of Directors of the New York Cotton Exchange have lately adopted a rule requiring all customers to post initial margins not less than those fixed for clearing members by the clearing association; all margins to be restored to the initial amount when one-half exhausted. Hedging and straddle trades are exempt.

The new rule of minimum margin requirements by the New York Cotton Exchange reads as follows:—

"Initial margins equal to not less than those fixed for clearing members by the New York Cotton Exchange Clearing Association Inc., shall be required of all customers. When customer's margins are one-half exhausted, they must be restored to the initial amount required by the foregoing. Any sales or purchases against a corresponding quantity or approximate quantity of purchases or sales of (A) spot cotton, (B) cotton products, or (C) futures contracts bought or sold simultaneously in different months or markets may be exempt from the provisions of this rule, provided that the carrying member obtains from his customer a written statement that all such trades are covered by this exemption, and provided further that the member is satisfied that the statement is correct."

The current clearing house rate is \$500 per contract of 100 bales, so that under the rule customers affected by it would be required to post this initial rate, and if losses of \$250 appeared they would be required to put up additional margin to return coverage to \$500 per contract. The

rule hits extension of credits to speculative accounts but does not affect spot interests who are hedging, straddlers, or mill accounts in futures offset by spot holdings, stocks of unsold cotton textiles, etc., or forward sales of such products. In recent years few commission houses have as a matter of fact extended credits on speculative accounts, and the usual custom of commission houses has been to require from \$500 to \$1,000 margins from speculative accounts.

COTTON CARRYOVER QUALITY

W. B. Lanham and F. H. Harper, cotton marketing experts in the Bureau of Agricultural Economics, in denying that for the past ten years the American cotton carryover has contained excessively large quantities of untenderable and unspinnable staple, reported that since 1928 cotton shorter than an inch in staple has not been made up of excessively large proportions of the very short lengths, despite a marked increase in the proportion of upland cotton shorter than an inch in staple in the carryover, and a corresponding decrease in the proportion that was an inch and longer in staple. Their report concluded :

"About 64 per cent. of upland cotton in the nine carryovers of 1928-1936 was extra white and white middling and above in grade. Spotted cotton constituted only about 13 per cent. of those carryovers and most of the spotted cotton was middling and above in grade.

"Less than 1 per cent. of upland cotton in the carryovers of 1928-1937 was lower in grade than the lowest of the established grades and only about 12 per cent. was untenderable on future contracts. About one-half of the untenderable cotton was shorter than $\frac{3}{8}$ inch in staple."

THE U.S. COTTON SITUATION

Except for 1931 the cotton growers have not had to market a crop as large as this year's since 1926. In that year the crop was 17,977,000 bales, and the price dropped from an average of 20.53 cents in the preceding season to a low of 12.15 cents in December. At the lower price buying from all the markets of the world converged on the United States; exports for the season rose to 10,926,000 bales, compared with 8,051,000 the previous season, and domestic consumption increased from 6,176,000 to 6,880,000, with the result that the crop was readily absorbed, and during the following summer the price recovered to 23.90 cents.

It was formerly the custom of many foreign spinners to buy two years' supply of American cotton, or more, in years of large crops, these reserves constituting a form of "ever-normal granary" and "stabilising"

the market just as much as any other kind of buying and storing would stabilise it. However, in the season mentioned, and in most other seasons prior to the A.A.A., American cotton had but minor competition in the world markets. Foreign cotton crops totalled only 9,808,000 bales in 1926-1927, but this season they will evidently total 19½ million or more, and from 8,000,000 bales or more each season our exports dropped last year to 5,500,000.

All authorities agree that the 12 and 10-cent loans to growers on cotton made in the 1933-1934 and 1934-1935 seasons, which pegged the price of American cotton well above what foreign growers would sell for, were chiefly responsible for the doubling of foreign cotton production in six years, and for the loss of the export market which American growers need this year. However, another price-pegging loan is to be made this season, at 9 cents, with an additional 3 cents paid to growers who subscribe to next season's soil conservation plan. Thus the "losses" of the cotton growers attributable to previous Government policies will again be assumed by the Government, in the hope that another succession of poor crops will right the price situation again.

(National City Bank of New York)

THE TEXAS CROP

While there is considerable doubt in the minds of the Texas trade as to the immediate future trend of developments marketwise, all doubt as to whether the State will produce a 5,000,000-bale crop has been dispelled following ten days of excellent weather after October 1, on which date the Government crop report was made up. It now seems within the range of possibility that the State may produce as much as 5,250,000 bales, although if the price level stays low enough there is likely to be considerable short cotton of low grade left in the field, so that ginnings may not total more than 5,000,000 running bales. With this amount to work on, and in spite of the Government's liberal loan terms on the present market basis, the trade is concerned only with the question of markets, with the finding of an outlet for the largest crop the State has produced since 1931, when 5,330,000 bales were ginned.

U.S. COTTON FUTURES CONTRACTS

Numerous changes in cotton futures contracts either have become effective with the beginning of the cotton season on August 1, or are due to take effect at various times during the year. These changes will, from time to time, affect the value of cotton futures and the spreads between prices of futures between New York, New Orleans and Chicago cotton exchanges.

Mr. E. A. Beveridge, of the commodity department of E. A. Pierce & Co., lists the several changes in the contracts, in the New York *Journal of Commerce* "Annual Raw Cotton Number," with dates of their effectiveness, as follows :—

STAPLE PREMIUMS

Chicago.—Effective till February 28, 1938, receiver pays deliverer, on $\frac{15}{16}$ in. 100 per cent. of Houston and Galveston average premium, and on 1 in. 75 per cent.

Effective March 1, 1938, and thereafter, on 1 in. 75 per cent., and on $\frac{15}{16}$ in. 60 per cent. of Houston and Galveston average premium.

New Orleans.—Effective August 1, 1937, receiver pays the deliverer, on $\frac{15}{16}$ in. and 1 in., 60 per cent. of the average premiums in such spot markets as have established adequate systems of quoting these staples.

(NOTE.—When on June 15, 1937, the remaining four of the ten designated spot markets began to quote staple differences, opinions varied as to whether the average of all ten or the previous six should thereafter apply. Prior to August 1, 1937, the percentages were, respectively, 100 and 75.)

New York.—Effective August 1, 1937, receiver pays the deliverer, on $\frac{15}{16}$ in. and 1 in., 60 per cent. of the average premiums in such markets as do quote these staples on the day before the notice is issued.

FEES FOR INSPECTION, CERTIFICATION AND WEIGHING

Chicago.—Receiver pays the deliverer, one-half certification, one-half inspection, one-half weighing, one-half sampling up to September 30, 1937.

After September 30, 1937, receiver does not pay the above charges.

New Orleans.—Effective August 1, 1937, costs for inspection, weighing, sampling, supervision and delivery of samples to the Board of Cotton Examiners shall be paid by the certicator and may not be charged to the receiver.

Effective November 1, 1937, all charges in connection with certification shall be paid by the certicator and not be passed on to the receiver.

New York.—Prior to August 1, 1937, the deliverer collected one-half cost of certification, inspection and weighing from the receiver.

On and after August 1, 1937, the deliverer can no longer collect the above items.

COMPRESSION

Chicago.—Basis of delivery is high-density, i.e., other densities may be delivered at the cost of putting them to high-density.

New Orleans.—Effective till October 31, 1937, the deliverer can collect from receiver half cost of high-density compression if it is delivered high-density.

On and after November 1, 1937, other densities may be tendered at allowance equal to cost of putting cotton to high-density, the basis of delivery being high-density.

New York.—The deliverer can collect from the receiver on all cotton delivered high-density half the cost of compressing cotton to high-density.

DELIVERY TO SHIPSIDE OR IN WAREHOUSE

Chicago.—(1) Up to January 31, 1938, delivery must be made in warehouse (Houston or Galveston or Texas City).

(2) After January 31, 1938, deliverer must deduct from invoice the expense of removing from store, loading and delivery to shipside.

New Orleans.—(1) Up to October 31, 1937, delivery must be made in warehouse at Houston, Galveston, or New Orleans.

(2) After October 31, 1937, deliverer must allow in his invoice the cost of delivering to shipside, including marking.

New York.—The deliverer must deliver cotton in warehouse at Houston, Galveston, New Orleans, Mobile, Savannah, Charleston, Norfolk or New York.

SUPPLY AND DISTRIBUTION OF COTTON IN THE UNITED STATES

Linters are Included for the Years 1905-06 to 1912-13 Inclusive, but are Excluded for the Years 1913-14 to 1936-37

(Compiled from reports of the Department of Commerce)

Year	SUPPLY			DISTRIBUTION		
	Production, running bales*	Carry-over from previous year	Imports equivalent 500-pound bales	Exports, running bales*	Consumption, running bales*	Stocks on hand at end of year
	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales	1,000 Bales
1905-06	10,495	1,935	133	6,975	4,877	1,349
1906-07	12,083	1,349	203	8,825	4,974	1,515
1907-08	11,058	1,515	141	7,780	4,493	1,236
1908-09	13,086	1,236	165	8,890	5,092	1,484
1909-10	10,073	1,484	151	6,492	4,622	1,040
1910-11	11,568	1,040	231	8,026	4,408	1,375
1911-12	15,553	1,375	229	11,081	5,129	1,777
1912-13	13,489	1,777	225	9,199	5,483	1,644
1913-14	13,083	1,511	266	9,256	5,577	1,366
1914-15	15,006	1,366	364	8,323	5,597	3,936
1915-16	11,068	3,936	421	5,896	6,398	3,140
1916-17	11,364	3,140	288	5,300	6,789	2,720
1917-18	11,248	2,720	217	4,288	6,566	3,450
1918-19	11,906	3,450	197	5,592	5,766	4,287
1919-20	11,326	4,287	683	6,545	6,420	3,563
1920-21	13,271	3,563	211	5,745	4,893	6,534
1921-22	7,978	6,534	352	6,184	5,910	2,832
1922-23	9,729	2,832	450	4,823	6,060	2,325
1923-24	10,171	2,325	272	5,056	5,081	1,556
1924-25	13,639	1,556	303	8,005	6,193	1,910
1925-26	10,123	1,910	314	8,051	6,456	3,343
1926-27	17,755	3,543	832	10,927	7,190	3,782
1927-28	12,783	3,782	421	7,540	6,834	2,536
1928-29	14,297	2,536	442	8,044	7,091	2,312
1929-30	14,548	2,312	368	6,690	6,106	4,530
1930-31	13,756	4,530	99	6,760	5,263	6,370
1931-32	16,620	6,370	107	8,708	4,866	9,678
1932-33	12,710	9,678	130	8,419	6,137	8,165
1933-34	12,604	8,165	148	7,534	5,701	7,744
1934-35	9,472	7,744	107	4,799	5,360	7,209
1935-36	10,367	7,209	155	5,973	6,348	5,409
1936-37	12,243	5,409	253	5,440	7,945	4,498

* Round bales counted as half bales.

AMERICAN COTTON

IMPORTS OF FOREIGN COTTON INTO U.S.A.
 August 1, 1936, to July 31, 1937, with Comparisons
 (500-pound bales)

Country of production	1913-14	1932-33	1933-34	1934-35	1935-36	1936-37	5-year average 1932-36	Per cent. this year is of 5-year average
Egypt ..	138,579	67,800	90,523	71,176	65,602	75,268	76,438	98.5
Peru ..	12,627	6,053	3,644	1,192	1,125	1,741	3,108	56.0
China ..	20,772	50,788	18,321	3,185	25,914	51,437	21,080	244.0
Mexico ..	80,285	8	2,652	5,137	3,387	27,391	6,305	430.3
India ..	7,849	4,895	25,987	24,903	57,655	79,115	26,191	302.1
Other countries	876	885	989	1,438	1,134	18,082	1,210	1,494.4
Total ..	260,988	130,420	148,116	107,031	154,817	253,034	134,392	188.3

AMERICAN COTTON CONSUMPTION

July, 1937, with Comparisons

(Exclusive of linters)

Month	1913-14	1932-33	1933-34	1934-35	1935-36	1936-37*	5-year average 1931-32 to 1935-36	Per cent. is of 5-year average
	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Bales</i>	<i>Per cent.</i>
Aug. ..	422,350	404,497	588,002	418,941	408,325	574,289	449,139	127.9
Sept. ..	442,435	492,742	499,482	294,696	450,047	629,727	440,380	143.0
Oct. ..	511,923	501,893	504,055	523,032	552,840	646,499	508,569	127.1
Nov. ..	456,356	502,434	475,247	480,081	512,312	626,695	479,060	130.8
Dec. ..	456,202	440,439	347,524	417,344	499,773	692,921	424,096	163.4
Jan. ..	517,299	470,182	508,021	550,553	590,484	678,064	510,793	132.7
Feb. ..	455,231	441,203	477,046	480,339	515,977	604,439	473,161	140.4
Mar. ..	493,354	495,183	544,870	482,373	550,641	779,302	512,395	152.1
Apr. ..	499,646	470,359	512,594	468,402	578,762	718,947	478,920	150.1
May ..	466,744	620,561	519,290	470,412	530,894	660,460	494,708	135.3
June ..	446,145	607,261	363,262	383,982	555,449	681,394	464,532	146.7
July ..	448,333	600,641	359,951	390,712	607,056	583,066	447,385	130.3
Total 12 months	5,626,078	6,137,395	5,700,253	5,380,867	6,351,160	7,944,803	5,683,138	139.6

* Subject to slight revisions.

MOISTURE IN AMERICAN COTTON

The following interesting paragraph appeared in a recent market report issued by a well-known American cotton house. It not only bears out the point that a bale of cotton changes in weight, due to loss or gain in moisture, when moved from one place to another according to conditions of atmospheric humidity, but also states that the "shipper knows that cotton will gain in weight rather than lose" when shipping to Europe. To allow for this gain, the invoice weight is increased by 5 lbs. per bale for Texas cotton, 3 lbs. per bale for Eastern cottons and 15 lbs. per bale for Arizona cotton:—

"It is a matter of common knowledge that cotton quickly responds to atmospheric conditions. The quality of the fibre is such that it absorbs

moisture readily and soon dries out on exposure to heat. The practical result of this quality, inherent in all cotton, is that it may be set down as a safe generalisation that no given number of bales will weigh precisely the same thing when removed from any one point of concentration to another a considerable distance away. One hundred bales of cotton, at any point in the Delta, to take a concrete illustration, will not weigh the same number of pounds on reaching New England, the Carolinas, or Liverpool, that they weighed when shipped. This is, of course, a mere matter of fact to the cotton trade. It disturbs nobody, because *the mill pays for the cotton on its own weights at destination, and not on the weights of the shipper at the point of origin*. On the other hand, the shipper is not disturbed, because he can avail himself of means of protecting himself against weight variations which are recognised as legitimate by immemorial usage. Based on experience, the shipper knows also that through a period of years, *cotton will gain in weight, rather than lose*. Claims for gain or loss in weight are matters of everyday adjustment between the shipper and the mill." Our attention has been drawn to the fact that the new crop for the present season is showing signs of being much damper than usual. An English mill has reported that on several shipments on which moisture tests have been taken, the percentage of humidity content has worked out from 10.5 per cent. to 17.5 per cent.

Members are advised to watch this matter carefully.

MARKET REPORTS

We extract the following from the Market Letter dated November 3, issued by *Messrs. Reynolds & Gibson*, Liverpool.

With cotton in New York standing at around 8 cents, and the average quotation for Middling $\frac{3}{4}$ inch cotton in the South at 7.90 cents, it might reasonably be expected that farmers would take advantage of the 9 cent loan to dispose of a considerable portion of their cotton, but the terms of the loan are extremely difficult to understand in their entirety and no doubt the average farmer finds the same thing. The main feature of uncertainty is the extent to which the bonus of 3 cents is available. According to the conditions as initially stated, this bonus applies only to about 9 million bales, as the quantity eligible was definitely restricted by the amount of funds available for this purpose, announced as 130 million dollars, though it is possible, of course, that this quota might be extended by the voting of further funds for this purpose. As the quantity ginned up to the end of October must be somewhere in the region of 12 $\frac{1}{2}$ million bales, it would seem likely that all the cotton eligible, under the original terms, for the 3 cent bonus must have been marketed, but there is, of course, no certainty as to this, since, as mentioned above, alterations may be made. Offerings in the South definitely became lighter a week or so ago, which was an indication that the Loan had been attracting cotton, but more recently there are signs of offers being made on a cheaper basis, showing that the actual is again moving to markets.

The details of the new agricultural legislation which are shortly to come before the special session of Congress have not so far been made public and it is idle yet to conjecture as to their effect, in fact, the markets have been quiet for this reason, as with such an element of uncertainty overhanging the situation there is little disposition to take any view. One or two points have already been made, however, by the President ; firstly, that the undoubtedly vast expenditure necessary for the scheme must be found by the imposition of counterbalancing taxation to produce the necessary revenue, pointing to processing taxes, which will be very discouraging to trade ; and, secondly, the warning against piling up

unmanageable surplus stocks, which might be interpreted as favouring export subsidies. In any event, one would think that the Administration has by now learned its lesson from the results of its former policy in supporting prices for the benefit of foreign growers and that whatever is to be done will not err in that direction.

Messrs. Geo. H. McFadden & Bro., New York, write under date October 22, as follows :—

The cotton market has been a quiet and featureless affair with daily fluctuations negligible and the maximum swing for the week limited to about one dollar a bale. Its equilibrium was not even disturbed by the the wild gyrations of the stock market, which had such a visible effect on almost all other commodities. A brief examination of the supply and demand picture will readily furnish an explanation for this deadlock, which may prove to be only temporary but which might well last for some time.

At the present price level, it is unquestionably more profitable for the vast bulk of Southern producers to make a loan against their crop than to sell it in the open market. And it is a certainty that many have had recourse to a loan, while many others have withheld their cotton from sale in the hope of a later advance in price, failing which they can place their cotton in the Government loan. Inasmuch as they can do this at any time that they elect during the season, they have nothing to lose under this procedure. It is manifestly impossible to determine with any degree of accuracy how much cotton is going into loan, whether Government or private, and how much is being withheld. Early this week the Commodity Credit Corporation announced that thus far 574,000 bales had actually been pledged to the loan, but concurrently they stated that no doubt a substantial additional quantity had already been definitely earmarked. Neither is there a way of finding out what loans have been made through banks or other loaning agencies, and there is, of course, no method of ascertaining how much is being held back by the farmers. It is certain, however, that a large amount of cotton has been diverted from normal commercial channels.

In consequence, the market is being called upon to absorb much less than the usual hedge volume. Pressure from other sources is also limited for there is naturally little disposition to take the short side, and whatever long interest there is in the market seems to be in strong hands.

The supply of American cotton this season will total in the neighbourhood of 23,500,000 bales ; and the supply of all kinds of cotton this season will aggregate upwards of 49,000,000 bales. In the face of these figures, it is small wonder that the spinners of the world are currently somewhat apathetic in their buying attitude with regard to spot cotton. Furthermore, textile business in this country continues on the quiet side, even though recently there have been occasional buying flurries, and there is a feeling that the recent break in stocks may foreshadow a further contraction in general industrial activity. Such a state of affairs naturally restricts fixation of price by manufacturers on cotton for which they have already contracted and discourages anticipatory buying.

As a result of this situation, the market at present levels is accorded only moderate support by the trade, while from a speculative standpoint there is no great incentive to indulge in bullish operations.

If the market advances from this price a certain amount of cotton will come out from the South and there will likely be an inclination to liquidate speculative commitments. If the market declines from this price Southern offerings will unquestionably diminish while trade and speculative buying will increase.

It is our conclusion that under present circumstances a comparatively limited move in either direction will produce sufficient buying support or sufficient selling pressure to check the market. Just what it will take to move the market out of this rut or when that event will take place we do not pretend to predict. We doubt that it will be in the near future.

Mr. C. T. Revere, of Munds, Winslow and Potter, writes the following in his market letter of October 22 :—

In the narrow range and irregular swing of prices, it is possible to discern a dual influence for this state of affairs. It is traceable to a practical deadlock in the spot division, and a virtual absence of speculative interest in cotton.

The latter feature may be dismissed with the brief comment that dullness and rigidity of market movements do not interest the operator who attempts to follow sizeable price changes. In addition to this, the activity and violent fluctuations in the stock market almost completely absorbed speculative attention, whether an individual participated in trading or not. The spectacle of drastic declines and sudden reversal of the trend, at least, called forth academic attention.

The virtual stagnation in Southern markets is largely related, both directly and indirectly, to the operation of the Government loan programme. Whether the individual farmer takes advantage of the loan protection or not, a very large number are refusing to sell, hauling their cotton back from the gins and holding, either hoping for better prices or waiting until they decide to take advantage of the loan provisions.

Advices thus far received do not indicate that there has been a stampede to put cotton into the Government loan. Figures published early in the week estimated the amount at that time at about 574,000 bales, but the further comment was made that full returns had not been received and the total might be considerably larger.

Although well informed merchants are committed to the view that it probably would require the impounding of at least four or five million bales in the loan to create a permanently tight situation, there is little doubt that meantime the reluctance of farmers to sell and their disposition, at least temporarily, to hold, has produced a state of stagnation.

It is unfortunate that the present crop should not have contained a larger proportion of cotton of desirable quality. The staple in some districts is surprisingly short, while the unfavourable weather has done much toward lowering the grade. Consequently, the percentage of highly desirable premium cotton is disappointingly small, and thus lays the foundation for a basis so stiff that it may militate quite strongly against volume consumption of American cotton.

It would require the vision of a prophet or the rashness of irresponsible speculative prediction to cause one to venture a forecast on the nearby tendency of prices. Apparently the market at present has a "ceiling" within at least half a cent above the present level, while resistance of a most stubborn character should prevent a decline from exceeding that amount from current values.

In all probability there is no division of American production that is more interested in the outcome of the wages and hour legislation than the cotton branch of the textile industry. We do not believe it fair for proponents of the Bill to charge that antagonism to the principle of wage and hour regulation comes from stubborn Bourbonism. The principle involved in the legislation is alien to the spirit of American enterprise. In the opinion of students of social-economic history, it represents a reversion or retrograde movement to the Guild restrictions of late medieval times. It was not until productive activity was freed from these inhibitions that the world moved forward and began to solve the problem of scarcity.

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According to *The American Cotton Crop Service*, the call for the Extra Session of Congress on November 15, has stimulated interest among farmers in holding cotton for higher prices. Many of the growers now think the Extra Session will mean additional loans or that Congress will make the loan of 12 cents immediately effective instead of waiting another 12 months before paying the 3 cent subsidy. According to our crop reporters, most of the growers want crop control on a limited scale but not compulsory control as when the Bankhead Act was in operation.

Messrs. Weil Brothers, Montgomery, Alabama, state as follows in their semi-monthly crop letter, dated October 16, 1937 :—

Replies from our correspondents indicate, with few exceptions, that the weather has been perfect for harvesting since October 1. They estimate that picking in the southern half of the Belt is 75 per cent. and in the central and northern Belt 55 per cent. completed—with ginning almost as fast as picking. Very little top crop is reported.

We asked our correspondents : “ In your opinion, is the crop in your section as large as the Government forecast ? and without exception they answered in the affirmative. Judging from their replies, the spinning quality of the cotton is better than last year, though lower in grade—it varies in localities. The basis on spot cotton in the interior has advanced sharply for the reason that there are scant offerings. Some of our correspondents do not think there will be increased offerings from the country if the market does not advance materially from present levels. In fact, there is another “ Richmond in the field ”—that is the Government of the United States. It is lending on Middling 9 cents ; on Strict Low Middling 8½ cents and on Low Middling 7½ cents, and on 65 per cent. of allotments a premium of 3 cents will be paid in July 1938. Thus, to all intents and purposes, the Government is pegging the price. That means considerable to the farmers—they do not have to sell at a low market level. Meantime, according to our correspondents, a very large percentage of the cotton crop is going into the loan. Some districts are finding difficulty in obtaining sufficient classers to class the prospective loan cotton.



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EGYPTIAN COTTON

EGYPTIAN COTTON CROP ESTIMATE

The Egyptian Ministry of Agriculture announce their first estimate of the Cotton Crop for 1937-38 (in cantars) as follows :—

	1937-38		1936-37		1935-36	
	First Estimate	Final Estimate	First Estimate	Final Estimate	First Estimate	Final Estimate
Cotton over 1½ Staple						
Sakel .. ..	.. 552,000	561,000	520,052	962,000	901,100	
Others .. ..	.. 3,069,000	2,499,000	2,335,641	1,668,000	1,754,500	
Cotton over 1¼ Staple	.. 153,000	182,000	146,598	228,000	208,200	
Cotton over 1½ Staple	.. 7,149,000	5,942,000	5,901,080	5,228,000	5,478,500	
Total .. ..	.. 10,923,000	9,184,000	8,903,371	8,086,000	8,342,300	
Scarto .. ..	.. 218,000	214,000	203,818	169,000	192,500	
Total including Scarto	.. 11,141,000	9,398,000	9,107,189	8,255,000	8,534,800	

ACREAGE OF CURRENT EGYPTIAN CROP

The total number of feddans planted to cotton in respect of the current Egyptian cotton crop, by varieties, was as follows, with previous figures for comparison :—

	Feddans 1937	Feddans 1936	Feddans 1935
Sakellaridis	161,330	162,072	297,409
Achmouni and Zagora	1,142,784	998,393	938,285
Maarad	80,811	71,656	81,705
Giza 12	15,939	5,835	—
Fouadi	11,467	18,815	31,507
Giza 3	2,700	8,941	10,351
Giza 7	519,719	407,022	269,795
Sakha 4	41,331	41,773	27,591
Other Varieties	2,070	1,298	12,362
Total	1,978,151	1,715,805	1,669,005

EGYPTIAN GOVERNMENT'S INTEREST IN COTTON

The following interesting survey taken from a report upon the Economic and Commercial Conditions in Egypt, prepared by H.M. Commercial Counsellor in Cairo, amply illustrates the interest taken by the Egyptian Government in all matters appertaining to the development of Egypt's cotton trade.

(a) COTTON RESEARCH BOARD.—This Board, which is established at Giza, near the Ministry of Agriculture, of which it is an emanation, is in charge of all operations conducive to the improvement of the cotton plant and its intensive cultivation for export. The following notes on its recent activities indicate some of the features of the cotton-growing industry to which the Board gives its constant attention.

Control of Crop.—About 90 per cent. of the 1935 crop was grown from Government seed-stocks, provided by annual seed-renewal from Giza, the descendants of pedigree plants which were growing at Giza in or after 1925. This applies to "Uppers" with "Zagora," and to "Sakel" as well as to the specifically numbered Giza and Sakha cottons.

Giza 7.—Giza 7 has grown rapidly during the last two years. A quarter of an acre in 1926 produced 1.25 million cantars in 1935. This shows that it is practicable (and not merely possible) to plant all Egypt from one cotton seed in 10 years. In 1935 it occupied a similar area to Sakel but it gave one-third of a million cantars more; at \$15 instead of \$16 for Sakel, the profit to Egypt in this single season was £E.1,000,000, a figure much exceeded in 1936.

Other new varieties.—The introduction of the best spinning cotton ever grown in Egypt has begun with Giza 26. It is 10 per cent. stronger than Sakel, grade for grade, and yields moderately well, midway between Sakel and Maarad. It is a specialised product.

An easy-growing and easy-working cotton named Giza 12 is developing quickly. It will probably replace Delta Ashmouni (Zagora). It is relatively coarse, but as long as Sakel and the best yielder in Egypt as yet.

Two new cottons isolated during this period will probably displace all these in 10 years' time. They pay \$170 to \$180 per acre, as compared with \$168 from Giza 7 and only \$116 from Sakel. One is of Sakel quality.

The Spinning Test Mill.—The spinning test mill at the Botanical Section has exceeded all expectations. Its output is over a thousand tests a year, and by planned experiments in intimate liaison with the biologists it is revealing valuable information on every side of the growing, ginning, merchanting, and spinning of cotton.

Sand-sowing, or properly Dibble-sowing.—The use of this has begun to develop without any propaganda being needed. The average improvement in yield is 8 per cent. to 10 per cent., an astonishing effect from such a simple alteration.

Pink Boll Worm Control.—The way to control this pest is well established by destruction of old bolls on cotton sticks. The practical objection is the cultivator's need for such sticks as fuel. A large scale statistical study covering some hundreds of square kilometres is in progress, to arrive at an exact costing of the operation.

(b) ALEXANDRIA TESTING HOUSE.—During the cotton year 1935-36 the Alexandria Testing House showed a marked increase in all its activities. This increase was particularly noticeable in the department dealing with humidity tests on hydraulically-pressed cotton from the interior, though tests in respect of steam-pressed bales for spinners abroad have also been on the increase.

Practically all merchants and exporters now have regular and, in many cases, daily recourse to the Testing House. This may be taken as evidence of the increasing degree of confidence in this institution. Some apathy on the part of spinners is still apparent, due, perhaps, to the fact that they have not yet fully realised the advantages to be gained by testing in Egypt.

In addition to its ordinary work on moisture, the Alexandria Testing House also acts as intermediary between exporters and spinners in the way of drawing cotton samples for type and staples, and has now under consideration the organisation and equipment of a special laboratory for the purpose of carrying out special tests in connection with the estimation of the quality of various cotton types.

Although the existing installation is sufficient to cope with the present demand, and is in a position to deal with approximately 400 to 500 tests daily, the premises are being enlarged to allow floor space for new conditioning ovens in anticipation of a greater demand for tests from merchants, exporters and spinners next season.

(c) COTTON PESTS.—Special and energetic measures were taken by the Ministry of Agriculture early in 1936 to cope with the cotton leaf worm, the presence of which in dangerous numbers was reported from various points of the country in May. Notwithstanding the handicap under which the Ministry of Agriculture and local authorities laboured owing to the failure (as usual) of some 18,000 farmers to abide by the dispositions of the Berseem (lucerne) Law which prohibits the watering of lucerne after the 10th May so as to prevent its serving as a host for the worm to breed in, and to the fact that it was estimated that over 460,000 feddans (acres) were affected with the worm, the campaign of egg-cluster destruction (in which close on one million persons were engaged at a cost of about £E.40,000) directed by the Ministry was completely successful, the damage effected by the pest being kept within very restricted limits.

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EXPORTS OF

Total	Name of Firm.	Great Britain	France	Germany	Japan	Spain	Italy	India	Czecho-Slovakia
12,203	Aghion, Riquez & Co.	5,730	3,355	153	2,000	—	640	—	246
71,301	Ahmed A. Farhaly Bey	24,464	5,783	11,313	1,100	—	2,285	5,920	350
18,551	Alexandria Cotton Trading Co.	6,209	2,131	1,717	100	—	2,813	860	986
63,521	Alexandria Commercial Co.	25,109	3,334	1,602	10,583	—	5,201	358	3,300
50,558	Anderson, Clayton & Co.	10,566	8,435	2,730	750	55	6,640	2,036	1,050
12,800	Anglo-Continental Cotton Co.	5,119	2,927	50	300	—	—	1,174	100
7,418	Bibace & Co.	6,508	221	—	—	—	—	411	—
21,383	British Egyptian Cotton Co. Ltd.	10,680	2,893	155	1,250	—	2,389	833	647
2,808	Cambas, P., & Co.	1,437	300	330	—	—	85	301	—
1,826	Camilleri, Hector E., & Co.	403	875	30	—	—	518	—	—
64,139	Carver Bros. & Co. Ltd.	14,312	7,090	4,313	1,300	—	12,272	7,448	2,266
10,340	Casulli, M. S., & Co.	3,678	964	813	50	—	348	553	142
40,877	Choremi Benachi Cotton Co.	7,258	4,235	2,308	4,535	—	1,348	528	6,439
51,641	Cicurel & Co.	18,165	11,954	1,688	4,902	—	2,003	474	1,538
8,115	Comptoir Cotonnier d'Egypte	3,317	4,428	—	—	—	—	—	—
7,418	Cotonnière d'Alex. (Pierre Grandguillot & Co.)	6,056	1,045	—	—	—	—	25	—
8,462	Daniel Pasquicelli & Co.	2,645	2,009	366	—	—	—	1,280	447
7,874	Delta Cotton Co. (Doumani & Co.)	—	—	350	195	—	—	7,106	—
12,167	Eastern Export Co., S.A.	10,871	171	635	100	—	—	—	—
14,038	Eg. Cotton Ginners & Exporters	297	523	2,529	200	—	10,288	102	—
56,503	Eg. Prod. Trad. Co., S.A.	27,646	5,438	3,704	6,760	—	4,010	327	612
4,388	Elia, D. & A., & Co.	4,388	—	—	—	—	—	—	—
13,977	Elia Bondi	13,622	—	—	—	—	30	—	—
7,508	Engel Adrien & Co.	2,083	1,640	994	20	—	433	—	—
18,873	Escher, W.	24	204	13,341	—	—	271	500	1,170
19,895	Fenderl & Co.	5,346	1,792	2,324	375	—	2,430	50	870
12,104	Francis Lévy & Co.	6,711	997	—	—	—	135	4,261	—
12,879	Getty, W., & Co.	766	228	3,500	—	—	349	2,037	1,020
39,796	Japan Cotton Trading Co. Ltd.	—	—	—	39,496	—	—	—	—
9,586	Joakimoglou, C. Z., & Co.	4,183	1,490	512	—	—	782	734	480
28,653	Kupper	1,108	2,561	2,440	8,613	—	1,976	60	91
56,481	Lévy, Rossano & Co.	26,852	11,890	498	200	—	413	5,994	1,978
892	Lumbroso, M., & Co.	758	—	—	—	—	134	—	—
102,497	Peel & Co. Ltd.	28,371	7,970	13,257	21,330	—	1,854	2,728	5,133
43,472	Pinto & Co.	12,635	3,807	2,789	780	—	6,616	1,328	2,401
33	Pispinis Bros.	33	—	—	—	—	—	—	—
25,744	Planta, J., & Co.	5,708	504	476	2,100	—	3,754	250	5,938
48,745	Reinhart & Co.	1,605	8,051	3,046	13,295	—	2,103	11,076	1,471
9,974	Riches, Stabile & Co.	8,711	220	—	—	—	843	20	180
32,044	Rodocanachi & Co.	15,044	4,763	66	10,000	—	860	26	234
14,278	Rolo, J., & Co.	7,481	2,895	—	—	—	700	643	288
12,976	Sakellarios & Co.	10,790	1,204	63	—	—	92	200	147
45,292	Salvago, C. M., & Co.	22,598	7,627	731	1,175	—	1,136	300	3,478
1,406	Sellas André & Co.	1,311	—	—	—	—	—	—	—
23,849	Société Cotonnière d'Egypte	13,265	1,657	1,171	—	—	—	1,083	1,899
38,531	Soc. Mixr pr. l'Exp. du Coton (ex Lindemann)	—	2,446	4,055	11,695	1,400	—	748	52
17,322	Union Cotton Co. of Alexandria	8,184	6,157	414	—	—	1,668	352	—
7,367	Yazgi, A. & W.	2,631	2,809	—	—	—	44	2	66
6,013	Zalzal, Félix M., & Co.	5,926	—	87	—	—	—	—	—
3,292	Various	2,030	223	43	—	—	43	32	—
1,201,810*	Total	405,072	140,855	92,323	132,909	55	78,054	61,464	48,130
	Against 1935/36	379,643	154,421	96,302	79,000	59,883	52,362	43,994	42,457

Total of 1,201,810 Bales weighing 8,824,204* Cantars net.

Against 1935/36 Bales 1,101,681 weighing 8,099,213 Cantars net.

* Including 423 bales exported from other ports to France.
 " 500 " " " " " " " Japan.
 " 600 " " " " " " " " Sweden.

COTTON, 1936-1937.

Switzerland	U.S.A.	Poland	Roumania	China	Austria	Hungary	Belgium	Sweden	Canada	Portugal	Estonia	Yugo-Slavia	Greece, Syria, and Turkey	Holland	Bulgaria	Russia	Others
—	—	66	—	—	—	—	—	—	—	—	—	—	13	—	—	—	—
3,560	5,202	2,691	4,800	—	480	—	314	1,620	105	30	—	—	200	706	38	—	340
930	—	522	100	—	347	120	1,358	70	—	16	—	218	—	50	—	—	—
1,479	4,996	663	966	2,100	2,172	600	40	220	—	—	—	531	—	33	—	—	234
2,477	2,922	1,715	2,041	2,615	410	170	340	—	1,300	5	3,450	—	—	681	160	—	10
—	106	100	480	—	—	—	2,445	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	188	—	—	—	—	—	—	—	—	—	—
—	1,636	400	50	—	50	—	—	200	200	—	—	—	—	—	—	—	—
—	—	—	35	—	—	—	—	—	—	—	—	—	320	—	—	—	—
1,413	7,006	2,985	180	2,200	493	100	160	86	—	—	365	—	—	—	—	—	150
2,526	—	—	—	300	—	—	—	—	—	—	—	108	858	—	—	—	—
8,585	305	240	—	—	3,536	—	910	—	400	—	—	—	—	190	—	—	—
1,313	850	390	3,602	200	72	965	1,553	475	200	5	—	288	—	140	180	—	684
—	—	—	—	—	—	—	370	—	—	—	—	—	—	—	—	—	—
242	50	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	100	—	—	75	—	—	1,110	380	—	—	—	—	—	—	—	—	50
—	—	—	—	—	—	—	—	25	10	—	—	—	—	—	—	—	—
90	—	100	100	—	200	—	—	—	—	—	—	—	43	—	35	—	—
30	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
180	1,907	180	4,220	—	—	456	473	530	—	10	—	—	—	60	59	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	150	—	—	—	50	—	—	—	—	75	—	—	—	50	—	—	—
—	—	630	1,430	—	—	210	33	—	—	35	—	—	—	—	—	—	—
1,991	—	150	958	—	84	—	180	—	—	—	—	—	—	—	—	—	—
1,808	1,785	1,650	250	—	275	—	875	—	—	—	35	—	30	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2,288	677	399	800	—	—	—	—	—	—	—	—	—	406	320	—	—	—
—	—	—	—	300	—	—	—	—	—	—	—	—	—	—	—	—	—
45	—	—	130	100	135	830	10	—	—	—	—	45	80	30	—	—	—
6,222	—	1,244	400	3,200	450	60	66	40	—	—	—	—	5	114	—	—	3
1,353	1,183	198	3,756	—	720	144	821	135	75	82	—	170	24	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2,493	5,164	240	2,300	3,050	918	1,175	1,306	960	800	1,456	15	—	—	1,392	—	—	580
1,802	255	3,716	2,450	—	216	324	3,605	—	290	—	75	—	200	193	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
3,485	—	840	366	—	2,243	10	10	—	—	—	—	—	—	60	—	—	—
2,340	250	1,313	1,700	2,100	68	150	43	56	—	—	—	36	52	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	30	—	—	—	—	1,005	—	—	—	180	—	—	—	—	36
272	645	—	—	—	—	1,114	—	—	—	—	—	—	—	240	—	—	—
90	—	—	217	—	—	—	—	—	—	—	—	50	123	—	—	—	—
722	26	60	1,089	—	849	307	105	10	—	70	110	3,687	1,147	—	65	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	95	—	—	—	—
451	—	645	318	—	655	969	10	—	1,394	25	—	232	—	—	75	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
300	3,327	120	6,515	—	1,473	2,732	233	—	—	150	75	—	—	51	—	—	1
153	200	—	80	—	—	—	233	—	—	54	—	—	—	—	—	—	—
—	—	—	300	—	—	—	1,352	—	—	10	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
30	—	—	10	—	—	—	27	—	—	464	15	—	89	—	56	—	230
48,670	38,801	21,267	39,653	16,240	15,896	10,436	15,347	8,627	3,370	3,860	4,165	5,313	4,007	4,310	668	—	2,318
37,518	35,137	22,499	19,032	16,205	13,392	10,887	9,165	6,468	4,350	3,977	3,495	3,651	3,052	2,021	1,459	—	721

EGYPTIAN GOVERNMENT COTTON LOANS

The Agricultural Credit Bank of Egypt, in accordance with proposals made by the Minister of Finance, will increase from 100 to 300 cantars the maximum limit for cotton upon which advances to the agriculturalists are given. At the same time the Bank will increase the proportion of the loans from 80 to 85 per cent. of the actual value of the cotton.

In this way a large number of producers will be enabled to obtain the funds which they need under the most favourable conditions, the most important of which will be that they will not have to cover themselves should prices decline during the period of the loan.

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MARKET REPORTS

Messrs. Levy, Rossano & Co., Alexandria, report as follows, dated Oct. 23 :—

The Spot market has been more active during the period under review, and sales average between 4 to 5,000 bales daily.

Demand has been sustained for all varieties and all grades, particularly in respect of the medium grades in Gizas, the higher grades in Ashmouni, and all grades of Zagora. An outstanding feature of business has been the limited quantities received of medium grades, especially those of Giza 7, and this fact has led to an appreciable hardening of premiums for all the qualities mentioned.

The firmness in premiums for all the medium grades of Ashmouni, Zagora, Sakel and Giza 7, which appear to us to be less abundant this year in spite of a record crop and an obstinate holding movement by producers, has had as effect to bring near months at a premium over distant months, especially so in the case of the October delivery with the approach of the third and last tender against this contract.

Trade demand has somewhat slackened, owing to accumulated stocks in mills and the expectancy on the part of spinners for more advantageous price levels.

It should be noted that premiums for Giza 7, are at their lowest point, and we foresee a rise rather than a decline in the near future.

Messrs. The Alexandria Commercial Co. (S.A.), Alexandria, in their Weekly Report dated October 29, state :—

UPPERS. Transactions in this contract were numerous but quite well balanced and fluctuations in price were small. The character of the operations was principally commercial. This week there was a slight increase in covering sales from the Interior, on the other hand the demand from spinners was satisfactory and the purchases of futures against sales abroad provided the necessary counterpoise thus explaining the steady level of prices. Lancashire it appears was the principal buyer followed by the Continent. America and the Far East remain more or less out of the market.

The lack of medium grades on the spot market and the high premium demanded for F.G.F. is the cause for the firmness of the near month. As we have mentioned before, the basis grade of futures, i.e., F.G.F. is far from representing the average quality of the crop. More than once the Commission of the Bourse of Minet El-Bassal have suggested altering the basis but the Government have always refused their consent to the proposed change. While this situation exists, it is only natural that the present abnormal state of quotations should continue.

We do not anticipate a change in prices in the near future but the parity between American and Egyptian is slightly reduced and from a commercial point of view it is desirable that it should narrow still further.

Messrs. Reinhart & Co., Alexandria, write as follows in their Market Report dated October 29 :—

During the first days of the week, Alexandria futures fluctuated within narrow ranges. Prices declined under the weight of increased hedge-selling which was only partly absorbed by the trade. Speculators showed little or no interest, awaiting further developments. Some uneasiness was caused by renewed rumours of a possible devaluation of the Egyptian currency by about 25 per cent., but this was officially denied by the Government on the 28th inst. It is hoped that the Government's categorical denial of any intention to devalue the Egyptian Pound, will bring about a relaxation of the holding policy which has been followed by many cultivators in the belief that an inflation would ultimately bring about higher prices.

The Commission de la Bourse de Minet-el-Bassal have forwarded the following Résumé of information received during October, 1937 :—

LOWER EGYPT.—The temperature which prevailed throughout the month of October was favourable to the opening of the bolls of the second picking. Heavy rainfall during the night of the 27th/28th caused some damage, but this was of little extent as there remained few bolls on the plants.

Compared with last year, the yield per feddan is higher while the ginning outturn is practically the same. The good grades are more abundant.

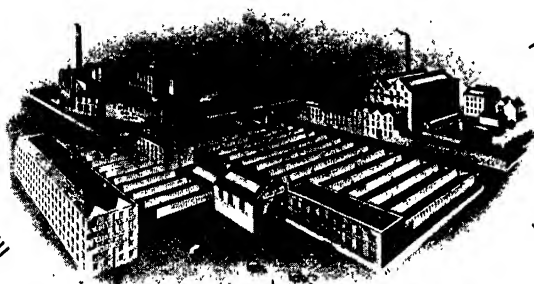
UPPER EGYPT AND FAYOUM.—The temperature during the month of October was generally favourable. The yield per feddan is higher than last year ; the ginning outturn is slightly higher.

The high grades are less abundant ; the medium grades more abundant. We estimate the crop at about 11,010,000 cantars.

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FIRST COTTON FORECAST, 1937/38

This forecast is based upon reports on the condition of the cotton crop at the end of July or early August. The reports do not, as will be seen from the detailed notes below, relate to the entire cotton area of India but to about 79 per cent. of the total. It should be noted that estimates for Burma are no longer included in the all-India totals.

The area sown is at present estimated at 15,225,000 acres, as compared with 15,259,000 acres (revised) at the corresponding time of last year. The decrease is due mainly to the decline in area in the Baroda State where sowings were not completed at the time of report owing to continued heavy rain in July.

Weather conditions at sowing time were not quite favourable, as sowings are reported to have been delayed in places by deficiency or excess of rain. The present condition of the crop, on the whole, is reported to be fairly good.

Detailed figures for the provinces and States are as follows :—

Provinces and States	Acres (Thousands)		
	1937-38	1936-37	1935-36
Bombay-Deccan (including Indian States) ..	1,414	1,302	1,496
Central Provinces and Berar	4,013	4,099	4,282
Punjab (including Indian States)	3,575	3,305	2,807
Madras	227	286	302
United Provinces (including Rampur State)	673	575	558
Sind (including Khairpur State)	953	855	779
Bengal (including Tripura State)	77	74	73
Bihar	30	31	31
Assam	43	37	35
Ajmer-Merwara	15	15	14
North-West Frontier Province	21	17	17
Orissa	7	(a)7	5
Delhi	2	2	3
Hyderabad	1,381	1,485	1,420
Central India	1,429	(a)1,271	1,145
Baroda	316	833	808
Gwalior	571	608	614
Rajputana	466	(a)441	406
Mysore	12	16	15
TOTAL ..	15,225	(a)15,259	14,810

(a) Revised.

A statement showing the present estimates of area classified according to the recognised trade descriptions of cotton is given below.

Descriptions of Cotton	Acres (Thousands)	
	1937-38	1936-37
Oomras—		
Khandesh	1,267	1,225
Central India	2,000	1,879*
Barsi and Nagar	873	811
Hyderabad-Gaorani	628	719
Berar	2,757	2,798
Central Provinces	1,256	1,301
Total	8,781	8,733*
Dholleras	83†	255
Bengal-Sind—		
United Provinces	673	575
Rajputana	481	456*
Sind-Punjab	2,291	2,249
Others	42	43*
TOTAL	3,487	3,323*
American—		
Punjab	1,649	1,466
Sind	611	464
TOTAL	2,260	1,930
Broach	233†	578
Coompta-Dharwars	10	27
Westerns and Northern	53	112
Cocanadas	24	24
Tinnevellies	162	162
Salems		
Cambodias		
Comillas and other sorts	123	115
GRAND TOTAL	15,225	15,259*

* Revised.

† The figures shown against "Dholleras" and "Broach" varieties refer to the crop grown in the Baroda State only. The comparative decrease is due to sowings in the State not having been completed at the time of report as a result of continued heavy rain in July.

INDIAN COTTON CROP

SECOND FORECAST

Details of the second forecast of the Indian cotton crop show the area divided into the following recognised trade descriptions:—

	Acres	
	1937-38	1936-37
Oomra	10,155,000	9,689,000
Bengals	3,744,000	3,666,000
Dholleras	1,933,000	2,263,000
Broach	1,249,000	1,402,000
Americans	2,336,000	2,008,000
Others	1,298,000	1,958,000
Total	20,715,000	20,986,000

MOISTURE IN INDIAN COTTON

According to a recent issue of the *Journal of the Indian Merchants' Chamber*, a member of the above body has drawn the attention of the Committee to the abuse of watering of cotton. The legislature for the licensing of Gins and Presses in the Presidency had the eradication of such abuses for one of its objects. It was therefore decided to obtain the feeling in the Indian Central Committee through the representative of the Chamber on that Body as to how far the said legislation had been effective in checking this abuse. Accordingly, the Committee requested their representative on the Indian Central Cotton Committee to obtain the necessary information.

INDIAN CENTRAL COTTON COMMITTEE

We have received from the Director of the Technological Laboratory of the Indian Central Cotton Committee, Matunga, Bombay, detailed particulars of cotton spinning tests made on the following varieties :— Cambodia, Tinnevely, Kalagin, Karunganni, Kumpta, Dholleras, Miraj, Navsani, Northern Cambodia, Westerns, A. R. Busoga, A. R. Jinja, A. R. Kampala, the last three being African cottons. All the above tests were carried out on samples of the 1936-37 crop. The Director will be pleased to forward details of these tests to any interested party.

CROP REPORTS

Messrs. Ralli Brothers Limited, of London, have communicated the following under date of October 19th.

INDIAN COTTON		ESTIMATES (in Thousands)				
		1937/38	1936/37	1935/36	1934/35	1933/34
CROP MOVEMENT IN INDIA		Preliminary	Present	Final	Final	Final
Oomras .. .. .	..	2,350	2,478	2,086	1,980	2,343
Bengal/Sind .. .. .	..	1,600	1,387	1,534	1,577	1,415
American Surats .. .. .	..	1,750	1,724	1,451	843	851
Broach/Surti .. .. .	..	800	700	598	360	551
Dholleras .. .. .	..	500	479	464	305	378
Comptah/Dharwar .. .. .	..	200	214	185	220	256
Westn/Northn/Dekkan/Carnats .. .. .	..	350	310	387	293	317
Coconada .. .. .	..	40	41	50	45	37
Tinnively/Cambodia .. .. .	..	450	475	402	400	434
Comilla styles .. .. .	..	50	49	56	52	52
Rangoon, etc. .. .. .	..	100	109	114	110	100
RECEIPTS (Net yield, plus previous undistributed surplus)		8,190	7,966	7,327	6,185	6,734
Handspindles and Mills' Loose Takings		750	750	750	750	750
SUPPLIES IN INDIA		8,940	8,716	8,077	6,935	7,484

	1937/38	1936/37	1935/36	1934/35	1933/34
CROP MOVEMENT IN INDIA—Continued	Preliminary	Present	Final	Final	Final
Less previous season's undistributed surplus ..	1,216	966	841	1,204	1,041
YIELD (gross) :—Our estimate ..	7,724	7,750	7,236	5,731	6,443
Government's ..	?	6,307	5,933	4,858	5,108
ACREAGE :—Estimate of final ..	25,000	25,219	25,999	24,023	24,137
DISTRIBUTION OF ABOVE SUPPLIES :					
Europe, etc.	1,250	1,800	1,645	1,394	1,422
Japan	1,750	2,500	2,222	1,776	1,750
China, etc.	25	50	150	50	350
Indian Mills	2,750	2,400	2,344	2,124	2,008
„ „ loose takings ..	250	250	250	218	222
Hand-spindles, etc. ..	500	500	500	532	528
Total Takings	6,525	7,500	7,111	6,094	6,280
Undistributed Surplus ..	2,415	1,216	966	841	1,204

INDIAN COTTON WORLD POSITION

SUPPLIES :

Opening Stock incl. } India ..	1,800	1,550	1,400	1,800	1,650
Mills' and Transit } Abroad ..	1,800	1,650	1,250	1,400	900
Yield, as above	7,700	7,750	7,250	5,750	6,450

Total Gross Supplies ..	11,300	10,950	9,900	8,950	9,000
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CONSUMPTION :

Europe, etc.	1,400	1,700	1,700	1,200	1,050
Japan, China, etc. ..	2,000	2,400	1,800	1,900	1,900
Cotton Mills, Indian Mills ..	3,000	2,650	2,600	2,000	2,250
Indian Hand-spindles, etc. ..	500	500	500	550	550
Sundry consumptions and losses	100	100	100	50	50

Total Consumption ..	7,000	7,350	6,700	6,300	5,800
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SURPLUS :

Gross	4,300	3,600	3,200	2,650	3,200
vs. Consumption	61.4%	49.0%	47.8%	42.1%	55.2%

AMERICAN COTTON :

Gross Supplies	23,710	19,265	19,540	20,275	24,450
Consumption	13,500	13,055	12,575	11,225	13,700
Surplus, gross	10,210	6,210	6,965	9,050	10,750
„ vs. consumption ..	75.6%	47.6%	55.4%	80.6%	78.5%

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INDIAN COTTON WORLD POSITION—Continued		1937/38 Preliminary	1936/37 Present	1935/36 Final	1934/35 Final	1933/34 Final
ALL COTTON :						
Gross Supplies	.. ..	50,610	43,915	40,835	39,930	42,695
Consumption	.. ..	29,500	30,805	27,765	25,355	25,635
Surplus, gross	.. ..	21,110	13,110	13,070	14,575	17,060
„ vs. consumption	.. ..	71.6%	42.5%	47.1%	57.4%	66.5%
MID SPOT IN L'POOL, Season's av.		*4.87d.	7.11d.	6.52d.	6.93d.	6.02d.
		* Today.				

On the information now before us, this season's Statistical Position of American and Other Growths, compared with the same figures for last season and the averages of the previous five seasons, appear today as follows :—

000's omitted, & the "others", based on bales of 478 lbs. net.	1936/37			1937/38			Averages 1932/33 at 1936/37
	American	Others	Totals	American	Others	Totals	
Opening Carry-overs..	6,965	6,100	13,065	6,210	6,900	13,110	15,787
Production ..	12,300	18,550*	30,850	17,500	20,000*	37,500	25,912
Supplies ..	10,265	24,650	43,915	23,710	26,900	50,610	41,699
Consumptions ..	13,055	17,750	30,805	13,500	16,000	29,500	26,877
Closing Surpluses	6,210	6,900	13,110	10,210	10,900	21,110	14,822
% of surpluses on consumption	47.6%	38.9%	42.5%	75.6%	68.2%	71.6%	55.1%

* Include Brazilians 1936/37 1,700 and 1937/38 2,100.

In attempting to show as above a picture of this season's cotton balance sheet as it appears on present conditions, we would mention that, as regards the figures of the Production the usual doubts still exist, but wish to stress especially that as regards the figures of the Consumption these doubts are intensified to an exceptional degree by the unusual uncertainties now prevailing.

In reality we have only the following vague generalities to go upon for the consumption. In the first place, we feel that the total world consumption will probably be less than last season's, although, in view of the lower prices, this is not the general opinion. In the second place, it seems to us that the consumption of Americans will be somewhat higher—despite probable reductions in America itself and the Far East—because American cotton this year is relatively the cheapest cotton, while last year it was the dearest, and consequently this season it is likely to make inroads into the consumptions of other growths. Therefore, the consumption of other growths will bear the brunt of the reduction.

The above figures show the statistical position to be very heavy. The American Crop during July, August and September made unexpectedly good progress ; the last Bureau Report showed a probable yield of 249.3 lbs. per acre (assuming that the last figure of the estimated acreage is correct), viz., more than half a basic bale of 478.4 lbs. Under the influence of the successive Bureau Reports it is not surprising that American prices broke considerably to a level which, economically speaking, is doubtless close enough to the cost of production to act as a natural check on excessive planting next season. Whether this means that we have seen the lowest price of the present season and that the markets will recover somewhat is another question. But the various loan plans of the United States Government help the farmer to tide over during the rush of the receipts and to avoid forced sales. Therein lies the importance of these measures, although it should be appreciated that they do not take the cotton off the market and relieve the eventual position.

This season, with its relative cheapness, it is probable that American cotton will go a long way towards regaining the position it formerly held in the world uses of all cotton, which position had dwindled (from a consumption of almost

60%) in consequence of the American Government's policy to raise prices, a policy which succeeded temporarily as long as the American crop was short through artificial or through natural reductions of the crop. But if the intention of the United States is to regain and keep its place in the world cotton markets (as a prominent Official is reported to have declared), it is difficult to see how this can be reconciled with dear American prices; the moment American cotton is relatively dearer, its place in the world consumption will doubtless fall off, as happened in recent seasons.

Whether the support offered by the Loans' programme in America will be able to sustain prices during the marketing of the crop, and whether rumoured fresh steps will be able to raise prices from their present low level, are open questions. But a comparison with previous seasons shows a certain likeness—in regard to percentage surpluses—with 1933/34, during which season the price of Liverpool Spot American averaged very much more than today's quotation of 4.87d. On October 19, 1933, Mid. Spot Liverpool stood at 5.48d. and the season's average was 6.02d.

The above prices show that on October 19, 1933, Middling spot in Liverpool was 61 points higher than today. Perhaps, however, a better appreciation can be gained if, instead of comparing spot prices, we compared forward values, say those of January the year after next in both cases; the reason for this is that, at times when prices are low and large supplies depreciate the near position, forward values reflect more correctly the broader and longer view of the market. Going on this basis, we find that on the above-mentioned date January, 1935, Futures ruled at a premium of 0.18d. over October 1933, whereas today January 1939 stands at a premium of 0.28d. over October 1937. This difference is not very material considering that the present season's general surplus will probably be appreciably heavier than that of 1933/34; but it means that present values of American cotton should really be looked upon as being 51 points, instead of 61 points below those ruling four years ago.

INDIAN COTTON CROP ESTIMATES

The question of improving the accuracy of Government cotton forecasts has been engaging the attention of the Indian Central Cotton Committee through its Cotton Forecast Improvement Sub-committee, and one of the means adopted to secure this end is to subject the All-India cotton forecasts of each season to a comprehensive post-mortem examination in the light of available information at the close of the season. In pursuance of a recommendation made by the sub-committee and approved by the Indian Central Cotton Committee that summarised results of the post-mortem examinations conducted should be issued annually, a report—the first of its kind—is issued in respect of the two seasons 1934-35 and 1935-36. While it is not claimed that every factor having a bearing on the actual production has been taken into account in arriving at the figures, it is felt that the facts available justify the publication of the results for general information. The figures for the actual crop have been arrived at from two independent methods according to the following formulæ:—(1) Approximate actual crop = net exports (exports—imports) of all cotton (by all routes) + mill consumption + village consumption + variation in stocks (stocks at the end of the season—stocks at the beginning of the season). (2) Approximate actual crop = cotton pressed + loose (unpressed) cotton received at spinning mills + net exports of loose cotton (all routes) - village consumption of loose cotton, including kapas. The actual application of the above formulæ is, however, subject

to certain limitations. For instance, cotton transported by road and cotton used for domestic purposes, such as the making of quilts, mattresses, etc. (also known as "village consumption"), usually taken as 750,000 bales annually, have not been taken into account, while the figures for variation in stocks make no claim to completeness.

The report shows that the approximate actual crop averaged 4,984,000 bales for 1934-35 and 6,528,000 bales for 1935-36, against the official estimates of 4,715,000 bales and 5,863,000 bales respectively. The forecasts were thus underestimates by 5 per cent. in 1934-35 and by 10 per cent. in 1935-36, while the percentages would be higher if "village consumption" was taken into account.

COTTON EXPORTS FROM INDIA

According to Ports of Shipment and Countries of Destination
(Figures supplied by Messrs. Volkart Bros., Winterthur)

Season 1936/37

(from September 1, 1936 till August 31, 1937)

Port of Shipment	Countries of Destination				Total
	Europe	Japan	China	U.S.A. etc.	
Bombay and Kathiawar Ports	523,802	1,612,403	49,600	13,365	2,199,170
Karachi	1,061,124	715,231	22,301	75,477	1,874,133
Coconada, Madras and Marmagaoa	76,525	74,650	—	—	151,175
Tuticorin, Calicut and Cochin	33,064	47,287	2,050	1,223	83,624
Calcutta and Chittagong ..	22,500	5,777	—	19,221	47,498
<hr/>					
Total Exports					
Season 1936/37.. ..	1,717,015	2,455,348	73,951	109,286	4,355,600
Season 1935/36.. ..	1,526,743	2,129,661	119,018	90,133	3,865,555

MOTES IN PUNJAB COTTONS

A paper prepared by Mohammed Afzal, of the Cotton Research Laboratory, Lyallpur, and published in a recent issue of the *Indian Journal of Agricultural Science*, stated that the number and position of motes in the locks of the three most important *desi* varieties of cotton, namely, 10 Rosea, 12 Sanguineum and 15 Mollisoni were determined during 1931 and 1932.

It was found that the total number of motes in *desi* cottons was far less in comparison with American cotton, but the disposition of the motes in the various seed positions was very similar. The number of motes was least in the centre of the locks.

The early and late pickings had a greater number of motes than the middle pickings.

It has been suggested that by far the most important cause of mote production is the defective nutrition of the developing ovules.

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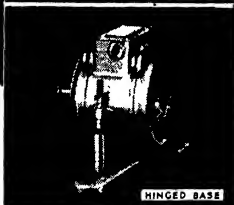
The sketch shows "Metrovick" hinged base $\frac{1}{2}$ h.p. Loom Motors driving Looms by means of Vee ropes or Chains.

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WATER-REPELLENT FINISH FOR FABRICS

Several references have recently appeared in the Press concerning a new process for making cotton cloth repellent to water, the result being obtained by the application of Velan P.F. The name Velan is a trade mark and is the property of the British Dyestuffs Corporation, a subsidiary of Imperial Chemical Industries Ltd., Millbank, London, S.W.1. The outstanding feature of Velan finish is that it is resistant not only to washing, but also to dry-cleaning.

Velan PF is marketed as a fine cream-coloured powder. It dissolves in water at 35° to 40°C. to give a slightly opalescent solution, from which on cooling the agent gradually separates as a very fine dispersion, in which condition it is usually employed, since the solution at 35° to 40°C. is somewhat unstable. The following recommendations are made for preparing dispersions.

Velan PF is stirred well for ten minutes with water at 95° to 105°F. (35° to 40°C.) in the proportion of 1 lb. of Velan PF per gallon of water, the water being added in small portions at a time. This solution is sieved to remove any aggregates and then diluted with cold water to the desired concentration. An addition of 5 oz. of crystalline sodium acetate (or 3 oz. of anhydrous sodium acetate) per 1 lb. of Velan PF should be made to the final bath. Under these conditions the product separates out in a finely dispersed form. This dispersion has a tendency to settle out, but occasional stirring of the bath is all that is necessary to keep it in suspension.

When treating thick fabrics or fabrics composed of tightly twisted and tightly woven yarns, penetration will be improved by using the bath at 35° to 40°C. In this case the bath is prepared by pasting Velan PF to a cream with a small amount of water at 35° to 40°C. and pouring this concentrated paste into water at the same temperature. The following precautions should be observed to obtain the maximum period of usage when employing warm solutions :—

- (1) The concentration of Velan PF should not be less than 1 lb. per 10 gallons of water, and sodium acetate must be added as recommended.
- (2) The solution should be made up immediately before use.
- (3) The temperature of the solution should not rise above 40°C.

THE VELANIZING PROCESS

The process for obtaining the full effects with Velan PF may be divided into three stages, the last of which, viz. heating, can be omitted where softness without permanency or proofing properties is required. It is necessary, in order to obtain the most satisfactory results, to carry out the velanizing treatment on unfinished or "pure" finished materials as the presence of certain softening and finishing agents in the material may adversely affect the result.

Impregnation. The impregnation of the material with Velan PF dispersions may be carried out in a jig, winch, or padding mangle when treating fabrics, or in a dye-beck when treating yarn. Any excess liquor in the goods should be removed by squeezing or hydro-extracting. Goods which have been wetted in a solution of a wetting agent should be well rinsed before entering in the Velan PF bath.

Drying. The best results are obtained from Velan PF if the padded or impregnated goods are dried rapidly. Slow drying must be avoided. The higher the drying temperature the more necessary it is to remove the resultant water vapour from the vicinity of the material as rapidly as possible. Drying is best conducted on a hot air stenter, festoon dryer, or on drying cylinders.

Heating. This is the most important part of the velanizing treatment, and care should be taken to adhere strictly to the specified conditions of time and temperature. The dried goods should be treated for a short period to a temperature which may vary from 212° to 300° F. (100° to 150°C.). This heating should preferably be carried out in a hot air chamber. In this process it is essential that the goods be heated uniformly to the required temperature for a period long enough to give the desired effect. The period of heating required varies inversely with the temperature operating, e.g., at 212°F. (100°C.) the heating should be for a period of at least five minutes, whereas at 250°F. (120°C.) a period of three minutes and at 300°F. (150°C.) a period of one minute should suffice.

These figures must be regarded as approximate only. It may be found necessary to increase or to reduce the period of heating, since a thick fabric will necessarily require a slightly longer period than a thin one to become heated throughout.

After the heating stage, the finish will possess the required resistance to washing and dry-cleaning, and where the necessary concentrations have been used a satisfactory water-repellency will be obtained. It should be noted that residual soap or other detergent left in the material after washing reduces the apparent water-repellency and, consequently, rinsing after washing should be thorough. After heating, the goods may, with advantage, be given a light lukewarm (100°F., 30°C.) soaping for one to two minutes in a bath containing about 2 lb. of soap and 1 lb. of soda ash (anhydrous sodium carbonate) per 100 gallons.

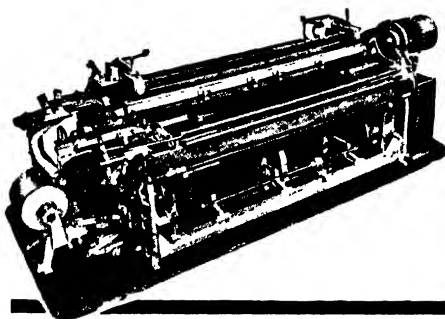
WATER-REPELLENT FINISHES

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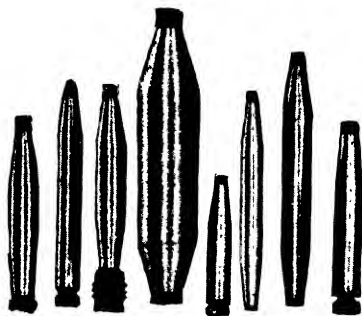
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of water. The concentration may be increased or decreased according to the nature of the material being processed. The bath must also contain 5 ozs. of sodium acetate crystals (or 3 oz. of anhydrous sodium acetate) per 1 lb. of Velan PF.

The application of Velan PF may be carried out by giving the material one or two runs on a padding machine, or two ends on the jig, or it may be applied on the winch. The goods, after treatment, are squeezed or hydro-extracted and dried and heated as already set out in the general description of the process.

An ammonia rinse or light soaping, as a final treatment after the heating stage, is optional but may be desirable where the goods have changed in shade or are left with a slight odour. In this case the material should either be passed rapidly at 68° to 85°F. (20° to 30°C.) through a solution containing one to two pints of ammonia (0.910) per 100 gallons of water, rinsed and dried, or soaped lightly as directed above.

Cotton Gaberdines. For water-repellent finishes on cotton gaberdines, the use of 3 to 6 lb. of Velan PF, according to the proof required, per 10 gallons of water is recommended, with the addition of 5 oz. of sodium acetate crystals (or 3 oz. of anhydrous sodium acetate) per 1 lb. of Velan PF. Difficulty may be experienced in penetrating this type of fabric with a dispersion, and in consequence a solution of 95° to 105°F. (35° to 40°C.) should be employed. The material should be given one or two runs on a padding mangle, dried, heat-treated and, if desired, given a light soaping treatment.

Silk piecegoods. The method of application and subsequent treatment should be carried out as described under *Dress materials*. Silk treated by the velanizing process acquires a highly water-repellent finish of remarkable softness. This finish is resistant to dry-cleaning and to normal washing treatments.

Woollen and Worsted Materials. The method of application here should be precisely as that given for *Cotton gaberdines*. Woollen and worsted materials thus treated are water-repellent and soft, and the finish is resistant to dry-cleaning and normal washing treatments.

PURE SOFT FINISHES

Rayon and silk. On viscose rayon, acetate, and silk, whether in the form or yarn or piece, Velan PF gives a very attractive soft finish when applied from a cold dispersion at half to 1 lb. per 100 gallons of water. The application may take place on the padding machine, winch, or jig, in the case of piecegoods, or in a dye-beck when dealing with yarn. If softening without permanency is sufficient, the goods may be dried in any convenient manner, but if permanency is necessary a further heating should be given at a temperature of 212° to 300°F. (100° to 150°C.), after the normal drying.

Cotton and linen. For soft finishes on cotton or linen 1 to 2 lb. of Velan PF per 100 gallons is recommended. Here again excellent softness and draping power are imparted by the treatment irrespective of the temperature of drying, but if permanency is required a subsequent heat-treatment, after drying, should be given at a temperature of at least 212° to 300°F. (100° to 150°C.).

A NON-SPLINTERING SHUTTLE

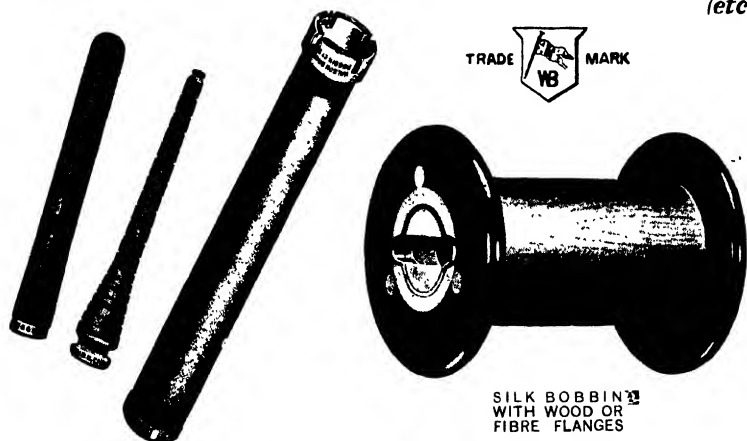
A good shuttle must remain smooth, even when roughly used, so as not to injure the warp, and another very important point in change looms is that the shuttles must all be of the same weight and retain it. Long life is also an extremely important factor for economic reasons. Even these brief remarks will have made it evident that it is by no means a simple matter to make a shuttle that will meet all requirements. On the other hand, it will be understood that shuttle-makers have spared no efforts to satisfy the most exacting conditions. Messrs. Friedrich Erdmann, Maschinenfabrik, Gera (Germany), have brought out a new patent shuttle which shows that the shuttle problem has been the subject of very earnest study. The new shuttle is a combination of wood and vulcanised fibre. The walls and the bottom are made of solid vulcanised fibre, the whole thickness of which is bent up to the tip. The vulcanised fibre has been free from all internal stresses, so that it cannot possibly warp. The front and rear parts of the shuttle are filled by wood. The combination of these two materials makes it possible to adjust the weight of the shuttle correctly and also has several constructional advantages, not the least of which is that the shuttle is made more durable. The main feature of the ingenious design, however, is that the shuttle cannot splinter and the fibre permits of easily removing any depressions, grooves, and so on by means of glass-paper. It is also an important feature that the iron coating of cloth shuttles can be dispensed with and that the new shuttle is no heavier than a wooden shuttle coated with iron. Elimination of the iron coating further makes it possible completely to balance the shuttle so that the cheek is not heavier and the shuttle cannot turn edge up on its way through the shed. The use of vulcanised fibre, which treats the reed gently, allows the use of thinner walls than does wood, so that there is room in the shuttle for large bobbins. Loom stoppages and faults in the cloth due to defective shuttles are out of the question.

(Melliand Textilberichte)

WEAVING FOR COVER AND CLOSE-SET WEFT

A Germany patent taken out by Herr Oscar Grimm, of Legenfeld (B.P. 442,827), attains a better weft density by preventing the return of the last weft pick into the warp plane by changing the tension quickly at the beat-up, after a certain number of picks, the last weft pick being held in its "cover" position by the reed at this instant. This change of tension, made in a short period at a beat-up, causes the weft to remain loosely in the fabric possibly for several picks and only to bind tightly in a close-set cloth owing to a change of tension between the sheds. The change of tension must only take place when the extra length of warp has been taken up.

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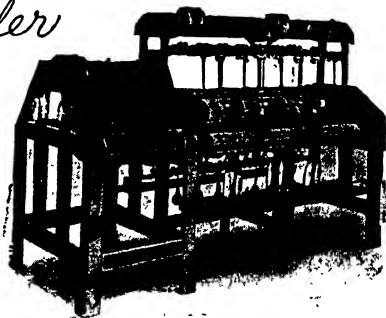
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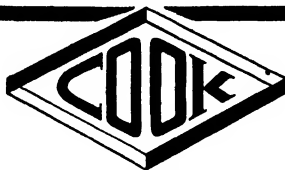
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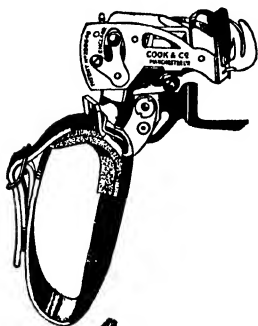
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DEVAUX HIGH-DRAFT SYSTEM

A new high-draft system, known as the Devaux System, has recently been designed. Use is made of a magnetic middle roller which is held down to the front roller by magnetism. The owners of this patent are Les Brevets Devaux S.A., Pavilly, Seine-Inférieure, France.

COTINE

According to a correspondent to the *Manchester Guardian*, the announcement is made that production is to be started on a commercial scale of a new natural textile fibre produced by a textile chemist after many years of botanical and chemical research. The new fibre, which goes by the name of cotine, was grown experimentally on the Continent last year. A company was formed in England to develop it commercially.

Cotine is a perennial plant resembling cotton in many ways, but less costly to produce. It will grow in most temperate climates and in semi-tropical countries. The claim has been made that it has a staple strength 40 per cent. greater than cotton, and that in this respect it is the nearest fibre to flax. It can be spun alone on existing spinning machinery or in combination with other commercial fibres. Yarns produced from cotine can be used in the manufacture of a variety of fabrics for clothing purposes, including woven and knitted underwear. Because it is absorbent another use may be in the manufacture of towellings.

Supplies of roots and seeds of the plant are in the possession of the British company, as also is the process for treatment of the raw fibres. For some time the company has been negotiating with a view to issuing licences for cultivation rights. Now it is announced that an agreement has been reached with an Italian company; planting will begin in Italy this month.

Licences have also been granted in Canada and Poland and there are negotiations with Sweden and Japan. The war with China and difficulties that have arisen over raw material imports have stimulated the interest of Japanese cotton spinners in the new textile fibre, which it is said could be grown successfully in Japan.

It is believed that cotine may also find a use in the wool industry. Tests under actual mill conditions with a mixture of 50 per cent. cotine and 50 per cent. wool have produced a yarn equal in strength to wool. It is, it is stated, scarcely distinguishable from wool except that it is more glossy—like mercerised cotton. The treatment and final manufacture from the specially prepared fibre are carried out on standard machinery as used in cotton, silk, woollen, or linen mills. The fibre, it is stated, dyes well after spinning and weaving.

The by-products of "cotine" are also said to have a wide commercial use.

U. S. IMPROVEMENTS IN COTTON SPINNING MACHINERY

U. S. Improvements in Cotton Spinning Machinery—

We have recently been informed, through the medium of *Cotton*, the well known U. S. cotton textile publication, of new developments which have taken place regarding cotton textile machinery. We publish the two following examples.

(a) NEW WHITIN DEVELOPMENTS

Developments in drafting sliver make it possible to spin yarn from single process roving. Four distinct types of drafting elements are available that will cover the complete range of coarse and fine work, the 3-roll system for drafts up to 6; the roving Long Draft system for drafts between 6 and 10, the Inter-draft for drafts between 10 and 16; and the Super-Draft for all drafts above 16. The Long Draft system may be applied to any standard slubber, intermediate, or roving frame, inexpensively. The Inter-Draft system has a curved folding plate, which conducts the roving under full control from the first to the second stage, according to the manufacturer. The Super-Draft may be used successfully in running mixed fibres of wool, rayon and cotton. It uses the double apron system in the front drafting stage. The makers of this system say that the selvages are under complete control, permitting a high draft without loss of control in the front section.

The new D₄ comber is three inches lower in height, thus aiding in preventing vibration, besides being an aid to the operator. Many individual parts are said to be eliminated or replaced by more effective and less complicated means. The number of needles in the half lap has been materially increased. The top comb has a larger number of needles and no adjustment of the comb is needed after it is once set, when changing staples or in changing waste percentages. The aspirator has also been improved to secure better control of air currents.

The new blending feeder is recommended to be used in multiples in the first opening process. It opens and blends the fibres from the different bales of cotton, and owing to the blooming action received, the cotton is said to be in a lofty and open state so that a higher amount of dust and fly may be removed. The standard Blending Feeder is 36 inches wide, is equipped with anti-friction bearings throughout, a small hopper feed to the bottom apron, feed indicator with sensitive rake motion operating an electric signal system, a built-in motor, dust exhaust fan, and grid bar cleaning chamber.

Whitin Machine Works, Whitinsville, Mass.

(b) HIGH DRAFT SYSTEM FOR ROVING

The recently developed high-draft system for roving frames employs rollers only, in combination with an entirely new and novel device to condense the opened fibres of the slubber drafting zone into an evenly laid and properly distributed bundle of fibres for the roving drafting

zone. The system consists, usually, of 5 rollers, viz., 5 fluted bottom rollers and 5 top rollers covered with either cloth and leather, cork or one of the synthetic rubber coverings. The 5 rollers are placed in two sections, the slubber drafting zone consisting of 3 rollers and the roving drafting zone consisting of 2 rollers. Between these two sections is the condenser. This is made of Bakelite, thus being a non-conductor of electricity. The helical groove provides not only a condensing of the fibres, but also gives them a complete one-half turn of twist. With this simple yet effective arrangement, drafts up to 25 on one-inch stock, and up to 30 and even 35 are possible on longer staple cottons and cut rayon, it is explained. This allows taking full advantage of the respective bobbin sizes on first and second intermediate frames as it allows a 60-grain sliver to be made into 3.50-hank roving on one-inch stock, and practically 5.00-hank roving on longer staple combed stock and cut rayon. It is further said that if finer hank sizes of roving are desired, these same draft ranges can be utilised by creeling double a coarse hank slubber roving, instead of drawing sliver.

For lower yarn numbers where only shorter drafts are necessary, the same principle of drafting and condensing is used, with the exception that in the slubber drafting zone only two rollers are necessary.

H. & B. American Machine Company, Pawtucket, R. I.

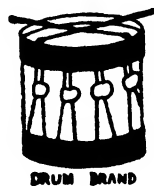
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YARN STRENGTH OF EGYPTIAN MIXINGS

By F. DUNKERLEY, A.T.I. (*Botanical Section, Ministry of Agriculture, Egypt, in the Journal of Textile Institute*).

Since the introduction of Law No. 51 in 1934 in Egypt, the practice of mixing different varieties has been entirely prohibited except in the very low grades, when the bales must be marked "mixed." In making up mixings in a spinning mill it will usually happen that many cotton fields have contributed to the material passing in, even when it is all of the same variety; moreover, it is not unusual for spinners to include different varieties in their mixings.

The questions of the effects of this on yarn strength have been investigated by the Spinning-Test Mill of the Egyptian Ministry of Agriculture, and the results are described in a paper in the Jour. Text. Inst., XXVIII, No. 8 T.255. In the experiments sixteen Egyptian cottons of known unmixed origin were mixed together in various proportions, 2, 3, 4 . . . up to 14 cottons at a time. Using a tested spinning technique (Casablancas apparatus on all frames except draw-frames), the mixtures and unmixed cottons were spun into 60's ring twist yarn, and tested for lea strength. A subsidiary experiment was carried out in which the cottons remained unmixed up to the final roving, and a mixed yarn was then produced by interchanging bobbins in the ring-frame creel (all the yarns were spun from double roving). A small number of the results given in the paper are shown in Table I.

The results of all the spinnings and testings may be summarised in one simple statement: 'The lea strength of any Egyptian mixing is near to the average strength of all the samples in the mixing, weighted according to the amount of each sample present. This rule is found to hold whether the staples mixed are long or short, fine or coarse, high grade or low grade, strong or weak; it holds whether there are few or many components in the mixing and whatever the proportions mixed; and each cotton contributes its undiminished quota to the yarn strength of the mixing.

The question hinges chiefly on the effect of staple length irregularity. In point of fact, the irregularity of staple length within any normal sample is so great that the mixing of samples together can cause only a relatively small increase in length irregularity. For example, the irregularity of staple length of a long Sakha 4 cotton was found to be 29 per cent., and of a short Ashmouni cotton 27 per cent.; these were mixed in equal proportions and the length irregularity of this extreme mixing was 30 per cent., barely higher than that of the more irregular component. That mixings are more irregular is not of course denied, and this applies to other characters besides staple length, but the increase in irregularity is perhaps less than is generally imagined.

It has long been accepted by cotton breeders that regularity of staple was amongst the spinners' primary requirements; but we had proved

even before this mixing experiment was begun that such differences in length irregularity as normally occurred between high grade cottons were of small importance compared to other factors. It is probably the association of wasty cotton with low grade that has given rise to complaint; the essential feature of low grade is its inclusion of damaged bolls—bolls damaged in the field, chiefly by the boll worm—and besides containing impurities, much of this cotton is short or immature. It is now clear that this form of wastiness is quite different from the straightforward case of irregularity.

The conclusions are :

- (1) The yarn strength of a 50 : 50 mixing of any two Egyptian cottons is near to the average yarn strength of the components spun unmixed.
- (2) Cottons contribute their undiminished quota to the yarn strength of mixings proportional to the quantities present, however many components there may be to the mixing and whatever the proportions mixed.
- (3) Even the asymmetrical structure produced by spinning a double roving yarn from odd roving bobbins is equal in strength to the mean of the components.
- (4) The tendency of mixings to be slightly higher in strength than the average of components; it is concluded that irregularity of staple (as distinct from wastiness) is not in itself a cause of weak yarn.

TABLE I.—50 : 50 MIXINGS

Cottons	Taker-in Waste %	Staple Length (of the Components)	Hair Weight	Lea Product	Mixing Lea Product	Mean of the Compon-	Deviation % from Mean
F.G. Giza 26B	2.4	25.5	130	3290	—	—	—
mixed with							
F.G. Sakha 4	2.2	24.5	125	3035	3205	3160	1.5
F.G. F. Sakel	5.0	23	140	2020	2720	2650	2.5
F.G. Giza 7	3.8	23.5	148	2570	2970	2930	1.5
F.G. Sakel	2.1	25	131	2090	—	—	—
mixed with							
F.G. Giza 26B	2.4	26	125	3185	3075	2085	0
G. Sakel	3.5	23.5	121	2915	2990	2950	1
F.G. Giza 12	3.5	22	165	2265	2675	2625	2
G./F.G. Ashmouni	5.2	20	183	1760	2425	2375	2
F.G. Giza 7	3.8	23.5	148	2570	—	—	—
mixed with							
F.G. Giza 26B	2.4	25.5	130	3290	2970	2930	1.5
F.G. F. Sakel	5.0	23	140	2020	2345	2205	2
F.G. Giza 3	3.9	22.5	147	2020	2260	2205	-1.5
G./F.G. Ashmouni	5.2	20	183	1760	—	—	—
mixed with							
F.G. Sakha 4	2.2	24.5	125	3035	2450	2400	2
F.G. Sakel	2.1	25	131	2990	2425	2375	2
F.G. Giza 23	3.4	23.5	168	2235	2020	2000	1
F.G. Giza 2	3.5	22	165	2265	1965	2010	-2

PRODUCING CORRECT COUNTS

The following is extracted from a recent issue of the *Textile Weekly*.

A good regular roving is the most important requirement for the production of a uniform yarn. It is quite impossible to spin uniform yarns from rovings that are irregular, for the irregularity of the rovings will always be reflected in the yarn. Even though the drafting mechanism

of the spinning machine may be perfectly efficient, the most that can be expected in this respect is that the uniformity of the roving would be maintained in the yarn. Since, however, no drafting arrangement is perfectly efficient, it follows that the yarn will always be less uniform than the roving from which it is produced. The most efficient machines produce the most uniform yarn.

TYPES OR IRREGULARITY

There are various forms of irregularity which may be classified as :—

- (1) Irregular “ wrappings ” on the same cop or bobbin.
- (2) Thick and thin places in the yarn, although the wrappings may be considered quite regular.
- (3) Different spindles of the same machine wrapping differently.
- (4) Wrappings varying with different machines.

With the first type it is often found that the yarn at the commencement of a set of mule cops will wrap finer than the yarn at the finish of the set. This is probably due to the yarn slipping off the spindles during spinning at the top of the set, and will thus occur more when using a large amount of carriage gain, or when spinning too high up the spindles. In the case of the ring frame the yarn at the finish of the set is often finer owing to the extra tension the yarn has to withstand at this stage.

In order to counteract this tendency of the mule to produce coarse yarn at the “ top of the set,” some minders are in the habit of putting a few extra weights on the salmon-head levers an hour or so before doffing. Others will put a little extra “ ratch ” on or take the “ roller delivery motion while twisting ” out of action. All these have the effect of making the counts more uniform throughout the spinning of a set of cops, although the means employed for its attainment may seem somewhat crude.

That the yarn does become coarser when spinning near the top of the spindles the practical spinner can have no doubt. Many minders know from practical experience that whenever the cops have been spun higher up the spindles than usual, there is always the danger of the overlooker putting a less pinion on during the next set. This, however, makes matters worse, as the next set may be doffed in the usual position, and the fourth variety of irregularity is the result.

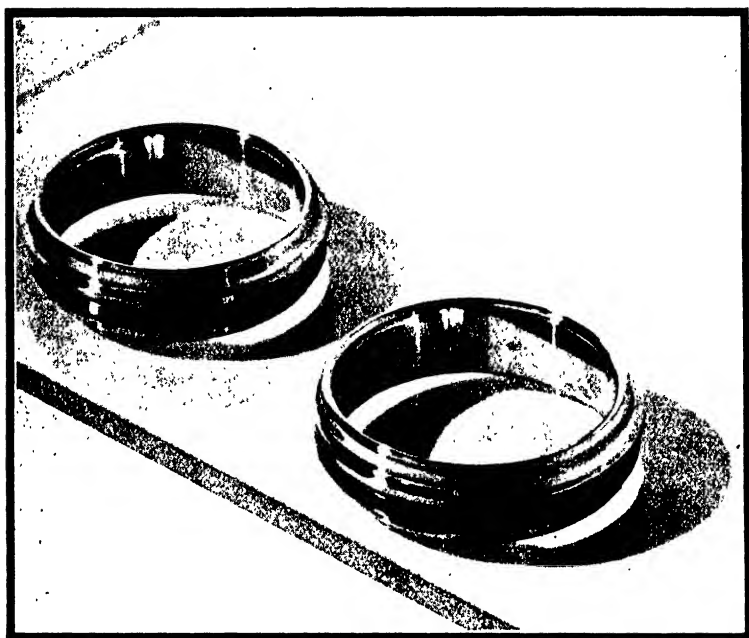
THICK AND THIN PLACES

Thick and thin places may be divided into two groups :—

- (1) Those produced on individual spindles.
- (2) Those produced the whole length, or half the length of the mule.

The cause of the first group of faults is undoubtedly local, and will generally be found to be due to :—

- (a) Badly covered or cut leather rollers ;
- (b) incorrect setting of the traverse guides ;
- (c) roller laps either on the bottom or top rollers ;
- (d) insufficient weight on the top rollers ;
- (e) roller hooks resting on the



QUALITY RINGS

of all kinds by EADIE

EADIE BROS. & CO. LTD., MANCHESTER

roller beam ; (f) dirty or poorly lubricated rollers ; (g) vibration near the headstock, usually caused by the slipping of the backing off or drawing up frictions.

The cause of the second group will generally be found at the headstock ; either due to the motion of the carriage or the gearing of the draft wheels. The carriage starting from the backstops too quickly is a well known cause of strained yarn. The "ends" need not necessarily be strained so badly as to cause bad spinning, but just sufficient to cause trouble at subsequent processes.

Sometimes thick and thin places will be caused by gearing the wheels connected to the front roller spindle too deeply. The "gain wheel" and the intermediate wheel between the back shaft and the front roller spindle are usually the culprits. Badly geared or worn teeth of the "side shaft bevel" and roller box are also responsible for much bad yarn.

The most common causes of thick and thin places will be found in the gearing of the draft wheels. Great care should consequently be given to these often neglected components of the spinning machine. The pinions especially need attention as they are constantly being conveyed to and from the store cabin. When pinions or other draft wheels with broken teeth get into the store cabin they should be scrapped ruthlessly. Tight downbelts or belts that move from loose to fast pulley too quickly are also a fruitful source of strained yarn.

Should the thick and thin places be confined to one-half of the mule, the obvious cause is the draft mechanism. It is good practice when seeking the cause in such a case to start first with the front roller pinion, and see that it is securely fastened to the front roller spindle, with the set-screw on the "flat" provided for that purpose. The crown wheel and pinion may then be examined to see that there are no teeth broken, and that the nuts fastening them on the shaft are secure. The back roller wheel may next be examined in a similar manner, care being taken to see that the bearings carrying the back and middle rollers are fastened firmly to the roller beam. The broad carrier driving the middle from the back roller may next receive attention. This should be examined to see that there are no teeth broken, and that there is no dirt on the teeth. The break draft pinions should also be properly keyed on to their respective shafts.

VARIOUS COUNTS OFF DIFFERENT SPINDLES

When wrappings taken from different spindles are found to vary, the cause is generally to be found in the hank roving. It must always be remembered when comparing the variation of the yarn counts with the variation of the hank roving, that the weight of the yarn considered is generally much less than the weight of the hank roving under consideration. In other words, when wrapping rovings it is usual to weigh 60 yds., and when wrapping yarn 120 yds. ; the yarn, therefore, will only weigh one-sixth the weight of the hank roving where a draft of twelve is employed. Thus it is quite possible to have a variation of counts caused by an irregular hank roving, although when wrapping the roving in the ordinary way no unreasonable irregularity may be found. To make

a proper comparison it is necessary to compare the same weights of yarn and roving.

On the rare occasions when cops spun on different parts of the mule are found to be wrapping coarser or finer than the rest of the cops, it is generally found that the fault lies with the travel of the carriage. It will easily be understood that should one section of the carriage have a longer or shorter "travel" than the other parts, the yarn spun on that section will wrap differently. Although it may seem incredible that one part of the carriage should move further than another part, this is precisely what happens when a mule has on draw bands of different diameters.

COUNTS VARYING ON DIFFERENT MULES

It often happens, when many pairs of mules are put on spinning the same required counts, that some difficulty is experienced in getting the counts regular. This may be due to having the "knocking-out," or the "ratch" different on each pair, it being difficult to have each mule exactly the same.

Such items as faller weights, "ride of counter faller wire," roller delivery motion, etc., all affect the counts considerably, and it is part of the mule overlooker's work to get these as uniform as possible. The human element too is often responsible for variation of counts, especially when the practice of frequently changing back roller wheels or crown wheels is resorted to. It sometimes happens, when either of these wheels have been changed a tooth or so, that they are forgotten when a fresh change is required. It is consequently not considered wise to change these wheels unless it is absolutely unavoidable. The pinions should be the only draft wheels changed to alter the counts; standard front roller wheels, back roller wheels, and crown wheels being adopted, and these only being changed on rare occasions.



INTERNATIONAL COTTON STATISTICS



The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half-year ended 31st July, 1937, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

[†] Owing to the Italian Association being precluded by official restrictions from supplying statistical information, and the continued omission of Russia to send returns in spite of repeated applications, the International Cotton Committee has decided that, for the present, no useful purpose would be served in attempting to issue figures purporting to show the World's Total Mill Consumption and Stocks.

The International Committee hopes, however, that the statistics supplied in respect of those countries making returns—which it is intended to issue as before—will be of comparative value with those issued for previous years.

Our Chinese Association has not been able to collect the usual figures owing to the dislocation of business in Shanghai and an estimate has been made for that country.

The total Cotton Mill Consumption for the Year ended 31st July, 1937, in countries which have furnished returns, compared with that of the same period of the previous year, is as follows. In making comparisons it should be remembered that none of the tabulations below includes figures for Italy, and that the 1936 figures are also *exclusive* of Germany, which country consumed a total of 1,142,000 bales all kinds in 1937.

	31st July 1937	31st July 1936	Increase or Decrease over previous year
	bales	bales	bales
American Cotton	12,921,000	11,815,000	+ 1,106,000
East Indian Cotton	5,948,000	5,390,000	+ 558,000
Egyptian Cotton	1,203,000	997,000	+ 206,000
Sundries	9,073,000	7,187,000	+ 1,886,000
All kinds of Cotton	29,145,000	25,389,000	+ 3,756,000

The total Cotton Mill Stocks on 31st July, 1937 and 1936, in countries reporting, according to Continental distribution, were as follows :—

American Cotton :

Europe ..	359,000 bales	against 319,000 bales	on 31st July, 1936.
Asia ..	329,000	" "	233,000 " " " "
America ..	1,304,000	" "	915,000 " " " "

The total Mill Stocks of American Cotton on 31st July, 1937, were 1,999,000 bales, as against 1,475,000 bales in the year 1936.

East Indian Cotton :

Europe ..	351,000 bales	against 279,000 bales	on 31st July, 1936.
Asia ..	1,452,000	" "	1,266,000 " " " "

Altogether the Mill Stocks of East Indian Cotton were 1,825,000 bales against 1,557,000 twelve months ago.

Egyptian Cotton :

Europe ..	151,000 bales against 150,000 bales on 31st July, 1936.
Asia ..	55,000 " " 38,000 " " " "
America ..	23,000 " " 19,000 " " " "

The total Mill Stocks of Egyptian Cotton were 264,000 bales against 221,000 bales twelve months ago.

Sundry Cottons :

Europe ..	667,000 bales against 474,000 bales on 31st July, 1936.
Asia ..	542,000 " " 472,000 " " " "
America ..	194,000 " " 144,000 " " " "

The **Total Mill Stocks** of all kinds of cotton on July 31st, 1937, in countries reporting, were 5,649,000 bales against 4,469,000 bales on July 31st, 1936.

The **World's Total Spindles** on July 31st, 1937, showed 149,618,000 as against 150,960,000 in January last.

N. S. PEARSE,

Manchester, September 8, 1937.

General Secretary.

SHORT-TIME TABLE

The spindle hours stopped by the firms reporting, when worked out over the whole industry of each country, indicate the following stoppages in weeks of 48 hours, and also the following percentages of full time worked. The calculations are based on a 48 hour working week, except where otherwise stated, and the half-yearly periods covered comprise 25 working weeks, one being subtracted for holidays. It should also be noted that short time taken up by plant and machinery idle during the whole of the six months has been taken into account.

	Half-year ending July 31st, 1937		Half-year ending Jan. 31st, 1937	
	Short Time worked (in weeks)	Percentage of Full Time worked	Short Time worked (in weeks)	Percentage of Full Time worked
Great Britain ..	2.91*	88	4.86*	81
Germany ..	1.94	92	1.91	92
France ..	2.78†	87	4.24	83
Italy ..	No reply	No reply	No reply	No reply
Czecho Slovakia ..	1.39	94	4.63	81
Belgium ..	2.10	92	3.38	87
Poland ..	1.91	92	2.76	89
Switzerland ..	2.02	92	3.46	86
Holland ..	1.23	95	2.67	89
Austria ..	4.05	84	4.37	82
Sweden ..	0.65	97	0.54	98
Portugal ..	0.01	100	0.66	97
Finland ..	None	100	1.19	95
Hungary ..	0.25	99	0.25	99
Yugo-Slavia ..	None	100	None	100
Denmark ..	0.81	97	0.31	99
Norway ..	0.98	96	0.45	98
Japan ..	19.91†	68(a)	17.73†	72(a)
China ..	No reply	No reply	11.14**	84(b)
Canada ..	1.77	93	2.84	88
Mexico ..	0.45	98	0.48	98
Brazil ..	0.62	97	0.98	96

(a) Based on working week of 120 hours.

(b) Based on working week of 132 hours.

U.S.A. In July, 1937, 24,392,000 spindles were active out of a total of 26,983,000 as compared with 24,365,000 active last January.

* The stoppage of the American Section amounted to 3.63 (5.76) weeks, and that of the Egyptian Section to 2.16 (3.84) weeks of 48 hours. There were 23 (37) firms with 776,632 (1,763,064) spindles in the American Section completely stopped during the period under review. In the Egyptian Section 3 (8) firms with 256,546 (538,208) spindles were completely stopped during the six months.

† This figure represents working weeks of 48 hours. The general working week in Japan is 120 hours. Calculated in Japanese working weeks the stoppage is equal to 8.30 (7.09) weeks for the last six months under review.

** The working week in China is 132 hours. Calculated in Chinese working weeks the stoppage for the half-year ending January 31st, 1937, was 4.05 weeks.

‡ France: 786,530 (846,106) spindles have been completely stopped during the past six months. Based upon a 40-hour working week, stoppage amounts to 3.34 working weeks.

(Figures in brackets and in *italic* refer to previous six months.)

Estimated COTTON MILL CONSUMPTION with previous figures for comparison, on basis of Spinners'

COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
	AMERICAN				EAST INDIAN			
	Half-year ending				Half-year ending			
	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935
EUROPE :—								
(1) Great Britain ..	641	621	733	516	226	202	196	172
(2) Germany ..	134	119	?	?	88	87	?	?
(3) France ..	307	343	357	269	117	107	95	100
(4) †Russia ..	1	6	59	44	—	—	—	—
(5) Italy ..	?	?	?	232	?	?	?	92
(6) Czecho-Slovakia ..	127	123	131	91	39	35	30	22
(7) Belgium ..	77	78	74	62	95	84	62	61
(8) **Spain ..	?	48	79	116	?	12	16	34
(9) Poland ..	85	97	108	92	4	1	3	8
(10) Switzerland ..	16	15	14	17	8	6	5	6
(11) Holland ..	55	41	42	36	27	23	22	17
(12) Austria ..	44	44	49	38	18	14	12	11
(13) Sweden ..	58	65	60	55	1	1	—	—
(14) Portugal ..	11	15	19	20	2	2	2	—
(15) Finland ..	27	25	25	22	—	—	—	—
(16) Hungary ..	24	30	29	23	9	6	7	4
(17) Yugo-Slavia ..	18	16	20	17	14	14	15	10
(18) Denmark ..	17	20	14	15	—	—	—	—
(19) Norway ..	6	6	6	5	—	—	—	—
Total ..	1,648§	1,712§	1,819||	1,670†	648§	594§	465||	537†
ASIA :								
(1) India ..	9	9	21	45	1,315	1,230	1,351	1,236
(2) Japan ..	747	618	772	846	1,004	978	844	856
(3) China ..	37*	38	39	104	42*	43	31	56
Asia Total ..	793	665	832	995	2,361	2,251	2,226	2,148
AMERICA :								
(1) U.S.A. ..	3,998	3,767	3,263	2,612	38	39	30	14
(2) Canada ..	151	144	121	106	—	—	—	—
(3) Mexico ..	—	—	—	—	—	—	—	—
(4) Brazil ..	—	—	—	—	—	—	—	—
America Total ..	4,149	3,911	3,384	2,718	38	39	30	14
Other Countries ..	22	21	33	26	10	7	14	11
HALF-YEAR'S TOTAL ..	6,612§	6,309§	6,068||	5,409†	3,057§	2,891§	2,735||	2,710†

† No returns from Russia. Figures for this country are estimated from trade sources.

** No returns from Spain since January, 1938. Figures since then have been estimated.

* China : no returns received ; July, 1937 figures are estimated.

for the half-year ending 31st July, 1937,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935
206	184	175	181	382	389	281	387	1,455	1,396	1,385	1,256 (1)
65	44	?	?	254	351	?	?	541	601	?	?
81	70	70	66	97	82	77	93	602	602	599	528 (3)
—	—	—	—	1,059	1,129	914	1,021	1,060	1,135	973	1,065 (4)
?	?	?	50	?	?	?	23	?	?	?	397 (5)
26	25	21	16	45	31	19	11	237	214	201	140 (6)
5	5	3	5	53	55	43	64	230	222	182	192 (7)
?	16	21	39	34	11	14	16	34	87	130	205 (8)
16	17	16	15	27	19	13	8	132	134	140	123 (9)
24	21	19	19	12	10	8	5	60	52	46	47 (10)
3	2	1	1	64	67	53	44	149	133	118	98 (11)
11	10	9	7	28	25	19	15	101	93	89	71 (12)
4	3	3	3	5	3	1	2	68	72	64	60 (13)
3	2	3	3	27	22	15	10	43	41	39	33 (14)
1	1	1	1	3	2	2	4	31	28	28	27 (15)
7	6	7	7	19	7	20	6	59	49	63	40 (16)
3	4	5	2	3	6	5	4	38	40	45	33 (17)
—	—	—	—	1	1	1	1	18	21	15	16 (18)
—	—	—	—	—	—	—	1	6	6	6	6 (19)
455	410§	354||	415†	2,113§	2,210§	1,485||	1,715†	4,864§	4,926§	4,123||	4,337†
27	29	18	41	189	146	141	118	1,540	1,414	1,531	1,440 (1)
67	44	43	50	243	301	198	103	2,061	1,941	1,857	1,855 (2)
15*	15	12	13	1,169*	1,197	1,073	1,000	1,263*	1,293	1,155	1,173 (3)
109	88	73	104	1,601	1,644	1,412	1,221	4,864	4,648	4,543	4,468
28	24	22	24	27	14	13	10	4,091	3,844	3,328	2,660 (1)
5	4	3	6	—	—	2	—	156	148	126	112 (2)
1	—	—	1	103	102	93	90	104	102	93	91 (3)
—	—	—	—	350	353	337	275	350	353	337	275 (4)
34	28	25	31	480	469	445	375	4,701	4,447	3,884	3,138
40	39	37	13	307	249	243	208	379	316	327	258
638§	565§	489||	563†	4,501§	4,572§	3,585||	3,519†	14,808§	14,337§	12,877||	12,201†

|| Exclusive of Germany and Italy.

† Exclusive of Germany.

§ Exclusive of Italy.

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935
EUROPE :									
(1)	Great Britain ..	70	61	54	47	100	43	69	58
(2)	Germany ..	20	15	?	?	13	19	?	?
(3)	France ..	109	103	88	84	97	57	98	108
(4)	†Russia ..	—	—	6	52	—	—	—	—
(5)	Italy ..	?	?	?	120	?	?	?	62
(6)	Czecho-Slovakia ..	32	36	29	21	20	9	12	11
(7)	Belgium ..	28	29	32	21	61	31	44	45
(8)	**Spain ..	?	Nil	15	14	?	Nil	5	5
(9)	Poland ..	7	5	12	6	1	1	2	1
(10)	Switzerland ..	13	20	11	13	13	6	8	7
(11)	Holland ..	25	26	18	21	21	8	18	14
(12)	Austria ..	8	11	9	9	4	4	4	4
(13)	Sweden ..	20	21	19	26	1	—	—	—
(14)	Portugal ..	2	2	3	5	2	—	1	—
(15)	Finland ..	6	10	5	4	—	—	—	—
(16)	Hungary ..	7	9	6	4	8	2	6	2
(17)	Yugo-Slavia ..	4	7	4	4	10	10	12	6
(18)	Denmark ..	5	5	5	6	—	—	—	—
(19)	Norway ..	3	4	3	2	—	—	—	—
Europe Total ..		359§	364§	319||	459†	351§	190§	279||	323†
ASIA :									
(1)	India ..	7	4	9	30	972	865	932	857
(2)	Japan ..	304	288	205	299	457	206	310	305
(3)	China ..	18*	10	19	37	23*	2	24	21
Asia Total ..		329	242	233	375	1,452	1,073	1,266	1,183
AMERICA :									
(1)	U.S.A. ..	1,223	2,034	856	749	18	4	8	8
(2)	Canada ..	81	63	59	57	—	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		1,304	2,097	915	806	18	4	8	8
Other Countries ..		7	5	8	11	4	1	4	2
HALF-YEAR'S TOTAL ..		1,999§	2,708§	1,475||	1,651†	1,825§	1,268§	1,557||	1,516†

† No returns from Russia. Figures for this country are estimated from trade sources.

** No returns from Spain since January, 1936. Figures since then have been estimated.

* No return for China, July, 1937 figures are estimated.

31st July, 1937, with previous figures for
made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935	July 31 1937	Jan. 31 1937	July 31 1936	July 31 1935
55	58	51	51	96	72	69	80	321	234	243	236 (1)
10	11	?	?	24	45	?	?	67	90	?	?
39	43	51	46	68	51	63	50	313	254	300	288 (3)
—	—	—	—	360	415	263	389	360	415	269	441 (4)
?	?	?	32	?	?	?	15	?	?	?	229 (5)
14	11	8	6	15	8	5	7	81	64	54	45 (6)
3	2	2	2	24	29	17	21	116	91	95	89 (7)
?	Nil	8	9	?	Nil	3	4	?	Nil	31	32 (8)
3	2	3	3	7	3	2	2	18	11	19	12 (9)
15	20	14	16	10	9	8	6	51	55	41	42 (10)
1	1	1	2	34	41	22	14	81	76	59	51 (11)
4	4	4	2	7	8	6	5	23	27	23	20 (12)
2	2	2	2	2	1	1	1	25	24	22	29 (13)
1	1	1	—	7	8	5	2	12	11	10	7 (14)
1	—	1	—	1	1	1	1	8	11	7	5 (15)
2	2	3	4	8	3	4	1	25	16	19	11 (16)
1	2	1	—	4	5	5	3	19	24	22	13 (17)
—	—	—	—	—	—	—	—	5	5	5	6 (18)
—	—	—	—	—	—	—	—	3	4	3	2 (19)
151§	150§	150	175†	667§	699§	474||	601†	1,528§	1,412§	1,222||	1,558†
16	15	13	22	94	35	62	66	1,089	919	1,016	984 (1)
34	20	20	27	112	74	66	22	907	528	601	653 (2)
5*	5	5	7	336*	584	344	251	382*	601	392	316 (3)
55	40	38	56	542	693	472	339	2,378	2,048	2,009	1,953
21	16	17	17	21	5	10	8	1,283	2,059	891	782 (1)
2	3	2	4	—	—	1	—	83	66	62	61 (2)
—	—	—	1	43	25	41	42	43	25	41	43 (3)
—	—	—	—	130	102	92	53	130	102	92	53 (4)
23	19	19	22	194	132	144	103	1,539	2,252	1,086	939
35	26	14	5	158	156	126	90	204	188	152	108
264§	244§	221||	258†	1,561§	1,680§	1,216||	1,133†	5,649§	5,900§	4,469||	4,558†

|| Exclusive of Germany and Italy.

† Exclusive of Germany.

§ Exclusive of Italy.

ESTIMATED TOTAL WORLD'S COTTON
years ended 31st July, 1937, and 31st Jan.,
the International

COUNTRIES		TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULF SPINDLES	
		Half-year ended		Half-year ended	
		July 31, 1937	Jan. 31, 1937	July 31, 1937	Jan. 31, 1937
EUROPE :					
(1)	Great Britain	38,753	39,938	28,002	29,186
(2)	Germany	10,236	10,247	2,893	2,996
(3)	France	9,783	9,932	2,303	2,403
(4)	Russia†	10,050	9,900	1,000	1,000
(5)	Italy	5,483‡	5,483‡	570‡	570‡
(6)	Czecho-Slovakia	3,445	3,548	1,324	1,427
(7)	Belgium	2,004	1,995	274	276
(8)	Spain	2,070	2,070	431	431
(9)	Poland	1,693	1,704	453	454
(10)	Switzerland	1,269	1,272	379	396
(11)	Holland	1,191	1,221	230	274
(12)	Austria	776	777	237	242
(13)	Sweden	584	591	39	36
(14)	Portugal	469	471	130	132
(15)	Finland	313	314	41	42
(16)	Hungary	317	312	30	37
(17)	Yugo-Slavia	154	163	29	37
(18)	Denmark	99	99	—	—
(19)	Norway	44	47	3	6
Total Europe		88,733	90,084	38,368	39,945
ASIA :					
(1)	India	9,876	9,877	587	587
(2)	Japan	11,880	11,853	8	8
(3)	China**	5,071	5,071	—	—
Total Asia		26,827	26,801	595	595
AMERICA :					
(1)	U.S.A.*	26,983	27,288	438	439
(2)	Canada	1,108	1,129	54	64
(3)	Mexico	869	865	7	7
(4)	Brazil	2,714	2,714	27	5
Total America		31,674	31,996	526	515
Other Countries		2,384	2,079	279	272
Grand Total		149,618	150,960	39,768	41,327

* U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

† No return from Russia. Figures for this country are estimated from trade sources.

‡ Figures for half-year ending July 31, 1935.

** No return received from China.

SPINNING SPINDLES (000's omitted) for the half-1937, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION	
Half-year ended		Half-year ended		Half-year ended	
July 31, 1937	Jan. 31, 1937	July 31, 1937	Jan. 31, 1937	July 31, 1937	Jan. 31, 1937
10,751	10,752	16,789	16,545	68	42 (1)
7,343	7,251	940	870	—	— (2)
7,480	7,529	2,467	2,216	1	14 (3)
9,050	8,900	—	—	?	150 (4)
4,913‡	4,913‡	700‡	700‡	?	?
2,121	2,121	687	642	6	3 (6)
1,730	1,719	78	69	3	8 (7)
1,639	1,639	207	207	?	— (8)
1,240	1,250	331	361	14	21 (9)
890	876	702	588	7	5 (10)
961	947	32	15	9	— (11)
539	535	116	83	—	— (12)
545	555	61	45	2	— (13)
339	339	51	45	—	— (14)
272	272	30	29	—	— (15)
287	275	58	74	—	— (16)
125	126	22	30	12	8 (17)
99	99	1	1	—	— (18)
41	41	—	—	—	— (19)
50,365	50,139	23,272	22,520	122	251
9,289	9,290	529	638	57	15 (1)
11,872	11,845	1,026	1,073	120	80 (2)
5,071	5,071	—	—	?	— (3)
26,232	26,206	1,555	1,711	177	95
26,545	26,849	1,000	1,000	?	?
1,054	1,065	69	67	10	— (2)
862	858	4	—	—	3 (3)
2,687	2,709	—	—	9	— (4)
31,148	31,481	1,073	1,067	19	3
2,105	1,807	361	403	38	43
109,850	109,633	26,261	25,701	356	392

TOTAL WORLD

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1937**	150,960,000	2,708	1268	244	1,680	5,900	39-08
" 1936†	153,133,000	2,089	927	237	1,210	4,463	29-14
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30-77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33-39
" 1933	158,984,000	2,699	832	208	803	4,542	28-67
" 1932	162,070,000	2,775	984	212	637	4,608	28-43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28-04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29-86
" 1929	165,104,000	2,958	1,216	182	938	5,294	32-06
" 1928	164,979,000	2,867	969	183	863	4,882	29-50
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38-09
Aug. 1, 1937**	149,618,000	1,999	1,825	264	1,561	5,649	37-76
" 1936†	151,745,000	1,475	1,557	221	1,216	4,469	29-45
" 1935*	153,778,000	1,651	1,516	268	1,133	4,558	29-64
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34-02
" 1933	157,755,000	2,558	1,527	235	730	5,050	32-01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27-71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26-58
" 1930	164,108,000	1,985	1,667	237	609	4,498	27-41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29-61
" 1928	165,103,000	2,112	1,728	170	777	4,787	28-99
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28-42

ESTIMATED COTTON MILL CONSUMPTION—In thousands of ACTUAL BALES (000's omitted)

Half-year ending								
July 31, 1937**	149,618,000	6612 } 12921	3057 } 5948	638 } 1203	4501 } 9073	14808 } 29145	98-97 } 193-94	
Jan. 31, 1937**	150,960,000	6309 } 12921	2891 } 5948	565 } 1203	4572 } 9073	14337 } 29145	94-97 } 193-94	
July 31, 1936†	151,745,000	6068 } 11815	2735 } 5390	489 } 997	3585 } 7187	12877 } 25389	84-86 } 166-57	
Jan. 31, 1936†	153,133,000	5747 } 11815	2655 } 5390	508 } 997	3602 } 7187	12512 } 25389	81-71 } 166-57	
July 31, 1935*	153,778,000	5409 } 10653	2710 } 5599	563 } 1084	3519 } 6882	12201 } 24418	79-34 } 158-12	
Jan. 31, 1935*	155,157,000	5444 } 10653	2889 } 5599	521 } 1084	3363 } 6882	12217 } 24418	78-78 } 158-12	
July 31, 1934	156,878,000	6513 } 13555	2403 } 4772	564 } 1108	3098 } 5697	12578 } 25112	80-18 } 159-65	
Jan. 31, 1934	157,718,000	7022 } 13555	2369 } 4772	544 } 1108	2599 } 5697	12534 } 25112	79-47 } 159-65	
July 31, 1933	157,755,000	7323 } 14170	2161 } 4220	472 } 934	2514 } 5028	12470 } 24352	79-04 } 153-78	
Jan. 31, 1933	158,984,000	6847 } 14170	2059 } 4220	462 } 934	2514 } 5028	11882 } 24352	74-74 } 153-78	
July 31, 1932	161,002,000	6202 } 12319	1976 } 4738	493 } 980	2121 } 4235	10792 } 22322	67-03 } 138-17	
Jan. 31, 1932	162,070,000	6117 } 12319	2812 } 4738	487 } 980	2114 } 4235	11530 } 22322	71-14 } 138-17	
July 31, 1931	162,278,000	5630 } 10908	2850 } 5363	459 } 853	2385 } 4864	11324 } 22488	69-75 } 138-00	
Jan. 31, 1931	163,571,000	5278 } 10908	3013 } 5363	394 } 853	2479 } 4864	11164 } 22488	68-25 } 138-00	
July 31, 1930	164,108,000	5940 } 13023	3102 } 6087	435 } 937	2530 } 5162	12007 } 25209	73-16 } 153-10	
Jan. 31, 1930	165,143,000	7083 } 13023	2985 } 6087	502 } 937	2632 } 5162	13202 } 25209	79-94 } 153-10	
Year ending Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160-34	

* Consumption and stock figures exclusive of Germany.

† Consumption and stock figures exclusive of Germany and Italy.

**SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending July 31st, 1937, estimated from Actual Returns**

CONSUMPTION

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Iraq	Sudan	East African	West South African	Australian	Chinese	Others	Total
Great Britain ..	55,659	149,397	44,762	6,844	806	1,220	4,687	674	77,010	20,507	14,652	494	—	253,729†	882,254
Germany ..	5,283	38,652	1,972	144	—	458	—	—	7,348	—	18,492	—	—	24,850	97,259
Italy ..	—	—	—	—	—	—	—	—	524	—	35,260	—	—	1,666	53,327
Belgium ..	3,511	11,316	687	—	—	—	—	—	1,906	1,347	4,432	755	—	833	21,702
Switzerland ..	3,704	15,774	326	—	562	3,184	—	—	1,824	186	704	—	2	64,334	84,508
Holland ..	2,894	17,000	—	1	273	24	12	—	405	120	37,206	305	—	18,523	64,428
Czechoslovakia ..	1,405	11,206	27	—	565	2,302	—	321	1,006	333	20,315	—	—	8,733	28,404
Austria ..	4,963	—	—	279	290	358	—	1,112	1,225	391	20,867	—	—	100	4,886
Sweden ..	—	3,509	—	—	—	—	—	—	—	—	2	—	1,169,000	—	1,169,000
China** ..	—	350,811	—	—	103,080	—	—	—	—	—	—	—	—	—	350,811
Brazil ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Mexico ..	—	50,275	—	—	—	—	—	—	—	38,736	—	—	37,271	—	103,089
Japan ..	—	2,397	—	—	—	173	—	—	407	15,691	15,691	—	—	—	243,495
Hungary ..	4	760	—	14,873	—	—	1	—	21,533	146,356	1,141	2,960	—	15	188,701
India ..	762	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Total ..	74,076	647,607	44,613	22,141	105,705	7,764	4,700	2,107	118,363	207,926	169,121	4,514	1,206,273	427,400	3,041,310

STOCKS

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Iraq	Sudan	East African	West South African	Australian	Chinese	Others	Total
Great Britain ..	9,381	16,819	4,197	4,429	428	1,274	2,710	127	46,755	4,782	1,535	210	—	9,839	95,742
Germany ..	2,573	26,952	677	36	—	324	—	—	18,782	—	8,365	—	—	21,541†	24,541
France ..	—	—	—	—	—	—	—	—	—	—	—	—	—	9,664	68,143
Italy ..	1,699	6,855	234	—	—	—	—	—	261	1,221	13,953	728	—	641	23,673
Belgium ..	888	3,156	302	—	—	242	—	—	2,315	39	301	—	—	27	10,314
Switzerland ..	1,500	2,801	103	—	64	176	246	—	2,259	97	14,247	—	2	33,481	6,079
Holland ..	469	5,709	—	40	184	995	—	5	352	60	3,897	—	—	14,202	33,481
Czechoslovakia ..	85	2,109	—	71	218	—	—	400	1,237	380	3,308	—	—	2,971	16,667
Austria ..	—	1,384	—	—	—	—	—	—	58	—	239	—	—	240	6,959
Sweden ..	—	—	—	—	—	—	—	—	147	—	—	—	336,000	—	336,000
China** ..	—	130,170	—	—	43,460	—	—	—	—	—	—	—	—	—	130,170
Brazil ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Mexico ..	67	1,113	—	6,107	—	—	—	—	—	—	5,575	—	—	—	43,460
Hungary ..	1,923	20†	—	—	—	—	—	—	26,857	57,722	547	828	—	1	77,888
India ..	18,782	199,310	5,513	10,743	44,356	3,112	2,963	532	100,196	64,301	55,690	1,772	336,002	54,026	93,687
Total ..	18,782	199,310	5,513	10,743	44,356	3,112	2,963	532	100,196	64,301	55,690	1,772	336,002	54,026	897,304

* Including 1,573 bales Paraguayan.

† No returns received.

‡ Not specified separately.

** No returns received. Figures estimated.

Bale Weights (Gross) in lbs.: Peru 480, Brazil 396, Argentine 500, West Indian 500, Mexican 500, Russian 396, Iraq 413, Sudan 450, E. Africa 410, W. Africa 414, S. Africa 500, Australia 511, Chinese 520, Paraguay 462, Turkey 400.



**SOCIÉTÉ ALSACIENNE
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of
Textile
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ACTIVITIES OF THE ENGLISH SPINDLES BOARD

The following is extracted from the first annual report of the English Spindles Board, issued recently.

During this first year we have acquired or agreed to acquire 3,265,000 mule equivalent spindles, involving the purchase of the plant and machinery of 48 mills. The total cost of these acquisitions amounts to £842,776. We have already scrapped 1,900,000 mule equivalent spindles and disposed of practically all the land, buildings, and other machinery appertaining thereto and the loss sustained in so doing has amounted to approximately £172,000. We estimate that on a similar disposal of the remaining 1,365,000 spindles we shall sustain a loss of about £240,000, making in all an estimated loss on our purchases during the first year of £412,000, which represents under 2s. 7d. per spindle.

We believe that throughout the period during which we have operated there has been plenty of machinery running to produce the maximum amounts of yarn required had manufacturers been able to estimate their requirements in time for spinners to adjust their production, and it is interesting to note that the owners of a considerable number of idle mills have not yet thought it worth their while to re-open their mills. Out of 76 mills which were entirely stopped during the six months ending September 14, 1936, only eleven have been re-opened during the ensuing 12 months, while several have been scrapped without the intervention of the Spindles Board. That redundancy has been greatly reduced is clear. How far this process can be carried it is impossible to say, but that it is not at an end is evidenced by the fact that since the period dealt with in this Report we have been engaged in various negotiations for the purchase of mills containing a large number of spindles. It is equally difficult to anticipate whether and, if so, to what extent the facilities we offer may be employed by spinners in order to get rid, on reasonable terms, of out-of-date mills for the purpose of replacing them by new mills of the latest type. Obviously such operations can only be effected at a heavy cost to the spinners and, therefore, in times of sufficient activity in the industry to inspire confidence in those providing the necessary finance.

WAGES AND HOLIDAYS WITH PAY IN THE POLISH TEXTILE INDUSTRY

According to a recent issue of *Industrial and Labour Information*, an International Labour Office publication, the Polish Minister of Social Assistance has approved an award of the arbitration committee which had been appointed to settle a dispute in the textile industry of the economic district of Lodz, Kielce, and Warsaw. Among other questions considered by the committee were those of textile workers' wages and holidays with pay.

The arbitration award granted an increase of 10 per cent. on the rates of wages fixed by agreement and allowed certain variations to be made in the rates according to locality and type of undertaking.

The award also settled the question of the remuneration due for annual holidays with pay. Under the Act relating to holidays with pay the worker is entitled to receive for his days of holiday remuneration equal to that which he would have earned if he had not left work. In view of the fact that during the period preceding the holiday workers are often employed for only three or four days of the week, their holiday pay has often been heavily reduced. The arbitration committee decided that the calculation of the pay due for each day of holiday should be based on the average earnings for the calendar year preceding the year in which the holiday is due. From this annual period will be deducted any periods of absence due to sickness, accident, or military service. This system will put an end to the abuses of certain employers, who during the week preceding the holiday deliberately work short time in order to lower the payment due to the workers for their holiday.

The arbitration committee also decided that the holiday should be granted in such a way as not to fall in weeks including statutory public holidays other than Sunday.

By a later decision the Minister of Social Assistance extended the application of this arbitration award to the whole textile industry of the provinces of Lodz, Warsaw, and Kielce. This decision will tend to improve the conditions of employment of some 120,000 workers in the Polish textile industry.

REORGANISATION IN THE COTTON INDUSTRY OF THE U.S.S.R.

The following is extracted from a recent issue of "*Industrial and Labour Information*," published by the International Labour Office, Geneva.

An Order of the Council of People's Commissaries of the Soviet Union, of September 17, 1937, relating to measures for the improvement

of work in the cotton industry, contains a criticism of the activities of this industry and a series of provisions intended to improve the working conditions and the quantity and quality of production.

The Order deals among other matters with standards of output, technical management of the cotton industry, methods of payment, the training of staff and various questions connected with the condition of plant and the quality of production.

Standards of output. The Order criticises the complexity of the system of standards to be reached by the workers, and says that such a system confuses the workers and is detrimental to the organisation of work in the undertaking.

In future, the productivity of labour and the fixing of wages are to be based only on standards of output. The workers are no longer to be required to reach the so-called technical standards utilised for calculating the productive activity of the undertaking or the standards of utilisation of plant determined by the annual or quarterly plans.

Technical management. With a view to co-ordinating the work of technical management, which hitherto was the province of the four general departments of the cotton industry attached to the Commissariat of Light Industry, there will be established within this Commissariat a special division in charge of the technical management of undertakings in the cotton industry.

Methods of payment. The Order criticises systems of payment which make it impossible to arrive at a fair estimate of the results of work and do not stimulate the development of technical aptitude or the increase of output. It also criticises the present disproportion between the wages of certain groups of workers, as, for instance, between the wages of spinners and those of equally skilled workers employed in weaving.

To put a stop to these shortcomings, the Order provides that as from September 1, 1937, wages are to be raised in the following proportions : an average of 19 per cent. for various classes of spinners and auxiliary workers in the cotton industry ; an average of 20 per cent. for foremen, workshop chiefs, and certain classes of engineers and technical workers ; 18 per cent. for workers in undertakings producing spare parts for machinery and auxiliary material, and 20 per cent. for engineers and technical workers in such undertakings.

The Commissariat of Light Industry is further to simplify the system of bonuses payable to engineers and technical workers and assistant foremen. Engineers, for instance, are to receive bonuses when the plan of gross production is exceeded and on condition that the assortment of products and the quality of production are in accordance with the prescribed programme. Workers in charge of the greasing of machinery are to be paid according to a graduated scale, with bonuses in proportion to the attainment of certain standards of output by the workers employed on the machines which the greasers in question are to serve. Finally, bonuses in proportion to the quality of the warp are to be paid to finishers.

The training of staff. The Order fixes a detailed programme for the training of workers in the cotton industry. For instance, the Order requires the Commissariat of Light Industry to organise during the last quarter of 1937 a system of individual training of workers, in such a way as to have ready in the first quarter of 1938 some 20,000 skilled spinners, weavers, etc. In the schools attached to the factories and workshops in the cotton industry the number of apprentices is to be raised from January 1, 1938, from 16,250 to 18,750. In the same schools a system of training is to be organised for assistant foremen. The wages of certain groups of apprentices are to be raised. Finally, 200,000 workers are to receive during the period 1937-1938 technical training in their own occupation.

The programme also proposes an increase in the number of assistant foremen and engine-drivers. The number of learners in this occupation who receive collective training will be raised from 2,400 to 3,500 and that of persons receiving individual training from 900 to 3,000. Eight new special schools will be opened for 1,200 persons, and the number of assistant foremen receiving courses of training while continuing their work will be raised from 1,500 to 5,000.

Among the measures taken to improve the qualifications of foremen, engineers and technicians, the Order includes the organisation of higher training courses, which are to be followed by 14,000 persons in 1938, the increase in the number of pupils of technical schools, and the reorganisation of technical training colleges for the purpose of training in sufficient numbers the specialists required by the cotton industry.

Condition of plant and quality of production. The Council of People's Commissaries draws attention to the importance of proper organisation of the supply of spare parts and auxiliary materials and the repair of plant. The handing over of repair shops to the general departments of the Commissariat of Light Industry has been one of the causes of the difficulties of the cotton industry. Since this industry has been able to obtain its full requirements of raw cotton, the methodical and planned organisation of repairs to machinery has become the principal condition of its proper working. This organisation has become all the more necessary since cotton undertakings are now working with three shifts instead of one or two, the whole of the plant is utilised throughout the year and the speed of the machines has been increased in consequence of the growth of the Stakhanov movement. Thus wear and tear of machinery has been accelerated. To this it may be added that the production of new machinery is not yet sufficient to meet the requirements of the cotton industry.

These considerations have led the Council of People's Commissaries to consider a number of measures to provide for the repair of existing plant and the speeding-up of the production of new machinery. Among these measures are the handing over to the textile trusts of several repairing shops which had formerly been attached to the general departments of the Commissariat of Heavy Industry, the extension of several repairing shops and the increase of the quantity of spare parts and

auxiliary materials to be delivered to undertakings in the cotton industry. At the same time, the Order fixes the plan of production of new machinery and tools for the last four months of 1937 and for 1938. One of the objects of this plan is to put a stop to the present disproportion in productive capacity between spinning and weaving shops.

The new Order also contains detailed provisions relating to the organisation of the work of repairing existing plant and the time allowed for such work. It also provides that the staff in charge of repairs shall be paid in proportion to the rapidity of completion and the quality of the work done.

Finally, the Order notes that the Commissariat of Light Industry, while having at its disposal the necessary quantities of cotton of satisfactory quality, has failed to carry out the plan in regard to the assortment and quality of goods. In these circumstances the Council of People's Commissaries has decided to stop the production of certain kinds of material and calls upon the Commissariat of Light Industry to prepare, in agreement with the Commissariat of Internal Trade, proposals for the production of cotton goods of better quality. It also requires the Commissariat to improve the finishing of such goods. In particular, the production of mercerised cotton must amount in 1938 to 25 per cent. of the total output of cotton fabrics of the Commissariat. A larger choice of colours and patterns adapted to seasonal requirements must also be achieved.

CHINA

According to a Report on the Economic and Commercial Conditions in China, prepared by H.M. Commercial Counsellor in Shanghai and published by the Dept. of Overseas Trade, at the end of 1936 there were 117 cotton mills in China, with approximately 5 million spindles and 50,000 looms. Of these mills 44 were Japanese and five British. Towards the end of 1936 the mills began to benefit as a result of increased demand and greater purchasing power throughout the country, and there is now a general feeling of confidence in the future of the cotton industry in China, to such an extent that important plans for its expansion are in hand. In Tientsin Japanese interests are taking the lead in establishing new mills and extending existing ones, and in Central China associations of local merchants and officials, together with Shanghai financial interests, are planning the erection of a number of mills. It is not possible to determine exactly how much of the yarn produced is sold for hand-weaving, or rather for cottage weaving with hand-operated machines, but it is still a very large share of the total production. The cloth produced by the mills is mostly of the coarser counts, with a few exceptions: one of the best equipped mills in China, for example (a British owned mill), not only spins its own yarn, but weaves fine counts into cloth and prints and finishes much of its own production.

EGYPT

The following is extracted from a Report on the Economic and Commercial Conditions in Egypt, published by the Department of Overseas Trade.

The cotton textile industry of Egypt has been making steady progress. The output of the Misr Cotton Spinning and Weaving Company for the past six years is shown in the following table :—

Year.					Yarns. Lbs.	Cloth. Square Yards
1931	..	..	..	..	1,715,000	4,811,000
1932	..	..	..	..	4,794,000	11,529,000
1933	..	..	..	..	8,682,000	18,012,000
1934	..	..	..	..	12,678,000	25,071,000
1935	..	..	..	..	14,359,000	20,065,000
1936	..	..	..	..	23,577,000	37,490,000

In 1935 this company, which employs some 15,000 operatives, had approximately 100,000 spindles and 2,000 looms at work. By the end of 1937 the company hopes to complete additional units and to have at its disposal 150,000 spindles and 4,000 looms. Other activities of the company include dyeing and printing units in full operation, a flannel and hosiery section, a small lace and mosquito net section, and a woollen unit which is in course of establishment. It is calculated that the company used about 282,000 cantars (100 lbs. per cantar) of ginned cotton in 1936, as compared with 186,000 in 1935. The company's capital, fully paid, stands at £E.1,600,000 at present.

The output of the Filature Nationale d'Egypte, S.A.E., of Alexandria, has also been on an ascending scale since 1933 as the following table indicates :—

Year.					Yarns. Lbs.	Cloth. Square Yards
1933	..	..	..	..	9,500,000	12,000,000
1934	..	..	..	..	11,500,000	12,450,000
1935	..	..	..	..	12,250,000	14,500,000
1936	..	..	..	..	14,000,000	14,750,000
1937 (expected production)	..	..	..	..	18,000,000	16,500,000

The fully paid capital of this company is £E.487,500.

The associated Alexandria company called the Société Egyptienne des Industries Textiles (in which the Calico Printers' Association is interested) produced 2,500,000 yards of cotton cloth in 1936, and it is estimated that its production will reach the figure of 7,500,000 yards in 1937. This company is also successfully engaged in the printing of cotton cloths. Its issued and subscribed capital is £E.400,000.

Another concern, and one in which the Filature Nationale d'Egypte is interested, is the Egyptian Hosiery Company, S.A.E., founded at Alexandria in 1935 with a nominal issued and subscribed capital of £E.80,000, which manufactures hosiery, and bleaches and dyes cotton, natural silk, and rayon yarns.

Also engaged in the textile industry is the Egyptian Weaving and Knitting Company, S.A.E., founded at Cairo in 1935 with a subscribed and fully paid capital of £E.40,000.

In addition to the foregoing companies there are a number of Egyptian concerns of lesser importance similarly occupied in the manufacture of cotton cloth.

Finally, a very recent and important recruit to the ranks of Egyptian textile manufacturers and processors is a new concern founded early in 1937 for all printing and dyeing processes, to be combined in the near future with cotton spinning and weaving. The new concern has close affiliation with the Bradford Dyers' Association and will have its factory near Alexandria and its head office at Cairo. Its chairman is a well-known and distinguished English official until recently in the service of the Egyptian Government.

The approximate consumption of ginned Egyptian cotton by the local cotton spinning and weaving mills in 1936 was 400,000 cantars. This consumption, it is believed, will reach 750,000 cantars or thereabouts by 1940.

The cotton textile industry in Egypt has now reached a stage of development where it will be interesting to examine the position in the light of such statistics as will serve to indicate the prospects for the importation of Manchester goods in the coming years. Reference to the figures here subjoined shows (a) the imports, (b) the local production, and (c) the consumption of cotton piecegoods in Egypt during the years 1930 to 1936.

Year	Imported	Metreage or Yardage		Per cent.	Total consumption
		Per cent.	Locally manufactured		
1930 ..	180,000,000	96.8	6,000,000	3.2	186,000,000
1931 ..	147,000,000	91.0	14,500,000	9.0	161,500,000
1932 ..	174,500,000	87.5	25,000,000	12.5	199,500,000
1933 ..	197,000,000	86.8	30,000,000	13.2	227,000,000
1934 ..	182,000,000	82.9	37,500,000	17.1	219,500,000
1935 ..	193,500,000	84.0	34,500,000	15.1	228,000,000
1936 ..	169,500,000	75.7	54,500,000	24.3	224,000,000

Note.—For the purposes of these statistics, square metreage and yardage have been assimilated.

The noteworthy feature which immediately strikes the attention is the increase of local production since 1930 which—with one pause in 1935—shows a swift progression. The continuation of this feature may be confidently expected in the course of the next few years as new spindleage and looms of the still developing Misr Mills and of the mills shortly to be erected for the subsidiaries of the Bradford Dyers' Association come into play.

The improving economic situation of the country is well reflected in the consumption figures for the last seven years, the average consumption of the three years 1930 to 1932 having been 182 million square yards, whilst that of the four years of recovery from depression, 1933 to 1936, reached 225 millions, an increase of 23.6 per cent.

MINIMUM WAGE AGREEMENT IN ARGENTINA

According to the *Textile Weekly*, of Manchester, a minimum wage agreement has been concluded between employers and operatives in the cotton industry, which was to be brought into force as from August 1, in the chief mills in Buenos Aires and the province of La Plata. The new minimum rates for an eight-hour working day are 2.40 to 4.00 pesos for female operatives and 2.00 to 4.50 pesos for male operatives. (16.00 Argentine pesos equal £1.)

MANCHURIA

There are five cotton mills located in Manchuria with a total of 180,000 spindles and 2,400 looms. The present estimated consumption of raw cotton by these mills is 136,000 bales annually. It is estimated that about 115,000 bales of raw cotton will be imported into Manchuria during the 1936-1937 crop year (October to September). Only a small percentage of the domestic crop is now used by Manchurian mills, while the remainder is consumed largely in household industries.

(U.S. Dept. of Agriculture)

ECUADOR

The textile industry in Ecuador comprises 20 establishments, most of which make cotton yarn, piecegoods, and knit goods; four of these produce wool yarns and fabrics as a side line, two manufacture rayon hosiery, and two make rayon knit goods in general. Rayon and novelty yarns are not produced in Ecuador; the total annual imports of all types of yarns approximate £12,000 in value. It is reported, however, that since the manufacture of knit goods is developing rapidly, demand for yarns is increasing. The principal suppliers at present are the United States, Germany, Switzerland, and Italy. European yarns generally are from 10 to 20 per cent. lower in price than similar yarns from the United States, but the American yarn is preferred from the standpoint of quality. At present, price is the most important consideration.

(U.S. Dept. of Commerce)

TURKEY

The several Government cotton textile and spinning mills, with a total of 59,200 spindles and 1,660 looms, produced 6,562,000 kilograms of cotton piecegoods in 1936. These plants now employ about 6,800

workmen. The annual output of privately-owned cotton textile and spinning mills amounts at the present time to 6,621,000 kilograms of cotton yarn and 4,233,000 kilograms of cotton piecegoods. (Kilogram=2.2046 pounds.)

(U.S. Dept. of Commerce)

It is reported that a new cotton spinning and weaving mill is being erected at Nazilli. Orders have already been placed with the mill. The weaving section will have two departments, one for the manufacture of cheaper materials for the agricultural population and the other for the manufacture of finer fabrics.

POLAND

On October 1, 1937, a decree made by the Minister for Industry and Trade came into force concerning the use of Kotonin (cottonised flax or hemp) by the Polish cotton industry. The cotton yarn producers are to be obliged to purchase home-produced Kotonin in an amount which will be determined monthly by the said Minister on the basis of figures supplied by the Association of Cotton Yarn Producers. The latter will allot the amount to be taken by each spinning mill in proportion to the normal consumption of cotton. The spinning mill can itself work up the quantity of Kotonin allotted to it or subject to the control of the Association, can dispose of it to other spinning mills. In addition to bounties to be paid, it is said, from a fund to be established for the purpose, spinning mills using Kotonin are to be allowed an additional allotment of raw cotton in the proportion of 1 kg. raw cotton for each kilogram of Kotonin worked up.

In connection with the above a meeting is to take place shortly at the suggestion of the Commission for the Standardisation of Flax and Hemp, in the rooms of the Lodz Chamber of Commerce and Industry.

It will also be attended by representatives of the producers and users of Kotonin, and will consider amongst other things the standardisation of flax as a raw material for Kotonin and the establishment of a control station for such flax.

(Textile Weekly)

RUSSIA

Production of textile yarns and fabrics during recent years in U.S.S.R. is shown in the following table, quoted in *Textile and Allied Products*, and extracted from official Russian publications.

					PRODUCTION OF FABRICS			
					<i>Million metres*</i>			
					Cotton	Wool	Linen	Silk
1913	..	..	..	..	2,238	71	(a)	(a)
1928	..	..	..	..	2,589	97	(a)	10
1932	..	..	..	..	2,690	93	136	21
1933	..	..	..	..	2,701	93	143	26
1934	..	..	..	..	2,673	83	160	31
1935	..	..	..	..	2,574	91	213	38
1936	..	..	..	..	3,219	98	300	52
					PLANNED PRODUCTION			
1937	..	..	..	..	3,215	91	(a)	(a)
1938	..	..	..	..	4,084	108	392	58
					PRODUCTION OF YARN			
					<i>Metric tons*</i>			
					Cotton	Wool	Linen	Silk
1913	..	..	..	..	304,100	46,500	53,300	(a)
1928	..	..	..	..	322,300	46,317	(a)	(a)
1932	..	..	..	..	355,000	71,000	54,500	154
1933	..	..	..	..	367,000	67,500	57,600	166
1934	..	..	..	..	388,000	61,000	66,800	202
1935	..	..	..	..	379,000	65,000	83,000	228
1936	..	..	..	..	467,610	(a)	(a)	

* Metric ton = 2,204.6 lb., metre = 1.094 yds. (a) Not reported.

The Soviet Union is exporting a small percentage of its cotton fabric production to Eastern Asiatic countries. In 1936 exports amounted to 188,000,000 tons metric (or 5.8 per cent of production) compared with 224,000,000 in 1935, 212,000,000 in 1934, 153,000,000 in 1933, and 188,000,000 in 1932.

CONDITIONS IN THE TEXTILE INDUSTRIES IN INDIA

WAGES, HOURS, ETC., IN BOMBAY IN 1934

The following is extracted from a recent issue of *Industrial and Labour Information*, published by the International Labour Office.

The Labour Office of the Government of Bombay recently published a report on wages, hours of work and conditions of employment in the textile (cotton, silk, wool and hosiery) industries in the Bombay Presidency in 1934.

This report is the third of a series in connection with the General Wage Census which was instituted in 1934 and covered all the 709 perennial factories which were working in the Bombay Presidency in that year. The first report, published at the end of 1935, covered nearly 75,000 workpeople in engineering concerns and occupations, and the second, published early last year, related to 100 units in the printing industry. The present report deals with over a quarter of a million workers in nearly 250 textile factories in all parts of the Presidency. The general wage census was held for May, 1934, but owing to strikes the census for cotton mills in Sholapur was taken for July and for cotton mills in Bombay for October, 1934.

Statistics relating to wages and conditions in the textile silk, wool and hosiery industries were collected and are published for the first time. So far as the cotton textile industry is concerned, the Labour Office had conducted three censuses into wages and hours of work in cotton mills in 1921, 1923 and 1926, and a departmental inquiry into wage cuts and unemployment in the cotton textile industry in 1934. For the purposes of the present censuses, the Bombay Presidency was divided into 10 territorial areas on the basis of a broad homogeneity of conditions, and the present report contains separate figures for each of those 10 areas for cotton textile factories and for such areas as had units for the silk, wool and hosiery textile factories. In the textile cotton group 35 factories concerned with dyeing and bleaching, reed manufacturing and repairing, etc., and some perennial cotton presses were covered for the first time. Out of a total number of 261,225 workers included in all types of textile factories, 214,451 or 82.10 per cent. were men, 45,746 or 17.51 per cent. were women, and 1,028 or only 0.39 per cent. were children.

SHIFTS AND HOURS OF WORK

The normal method of work in the textile industries in 1934 was a day shift of 10 hours for six days in the week, except where exigencies of trade or other reasons necessitated double shift working.* In Ahmedabad, 28 out of 87 mills worked double shifts, wholly or partially, in May, 1934, and the number of workers employed on night shift was 7,200. In Bombay City, 27 out of 57 mills worked a night shift in all or certain departments only, and the total number of workers employed at night was 20,000. Four mills in one group in Bombay City worked their weaving and certain accessory departments on the basis of three shifts of seven hours each. Nearly 90 per cent. of the total number of workpeople employed in all textile factories in the Bombay Presidency had a 10-hour day or a 60-hour week. The remaining 10 per cent. who had shorter hours were made up mostly of women winders and reelers and workers in the mechanics department of some mills. Only one unit had a short Saturday.

HOLIDAYS WITH PAY

Holidays with pay are granted in the textile industries only to jobbers, watchmen, and some of the higher monthly rated categories of workers in some mills. Most concerns do not grant any leave with pay to their workpeople. It is of interest to observe that in the engineering industry, 72 concerns employing nearly 60 per cent. of the total number of workers employed in that industry grant leave with pay to most of their employees.

*Under the Indian Factories Act of 1934, which came into force on January 1, 1935, the statutory limitation of hours is now 54 a week and 10 a day for adult workers in non-seasonal factories. Cf. *I.L.L.*, Vol. LII, No. 9, November 26, 1935, pp. 248-252.

REORGANISATION IN THE LANCASHIRE COTTON INDUSTRY

Proposals for the reorganisation of the Lancashire cotton industry were recently approved by the Joint Committee of Cotton Trade Organisations and are now issued in a 36-page report entitled "Lancashire's Remedy."

Briefly, it is proposed that the Government should be asked to introduce an Enabling Bill under which a Board representing the whole industry and an independent Advisory Committee would be set up to examine schemes brought forward on behalf either of the industry as a whole or of individual sections. The promoters of such schemes would have to show that they were supported by a majority of the section or sections concerned, that they contained safeguards against abuse, that they were in the general interest of the industry, and more particularly that they would tend to assist export trade.

It is also proposed that the representative Board should take the initiative, where necessary, in such matters of common interest to all sections as market research and propaganda. This is essential if the industry is to reap the full advantage of the economies and improvements which would follow the establishment of healthier conditions in the producing sections.

The main provisions of the scheme are as follows :—

- (1) A cotton industry board to be set up to develop the export trade.
- (2) A B.O.T.* committee to be appointed to consider all cotton trade schemes from a national standpoint.
- (3) Approved schemes to seek Parliamentary support.
- (4) Sectional interests to consider other sections' schemes.
- (5) The objects of the Bill outlined in detail, with removal of surplus capacity stressed.
- (6) and (7) Decisions need not be unanimous, but all firms engaged in the trade will be affected, and will have to be registered with the Cotton Industry Board.
- (8) to (11) These proposals deal with levies, research, and propaganda.

The Cotton Industry Board referred to would consist of twelve persons engaged in the industry : Two spinners, two manufacturers, one dyer, one bleacher, one printer, two merchants, and three operatives' representatives. The Board of Trade Committee would comprise three persons of wide business experience, but with no financial interest in the cotton industry.

* Board of Trade.

COTTON TRADE STATISTICS

GREAT BRITAIN

The following statistics have been compiled by the Spindles Board of Great Britain.

PRODUCTION OF SINGLE YARN (Correct to nearest 1,000 lb.)

	Six months to September 14, 1936 lbs.	Six months to September 14, 1937 lbs.	Per- centage increase
AMERICAN-TYPE cotton yarn	413,923,000	439 689,000	+ 6.2
EGYPTIAN-TYPE cotton yarn	141,520,000	152,042,000	+ 7.4
TOTAL COTTON YARN ..	555,443,000	591,731,000	+ 6.5
CUT STAPLE RAYON and mixture yarn	8,663,000	10,814,000	+ 24.8
TOTAL YARN PRODUCED ..	564,106,000	602,545,000	+ 6.8

N.B.—The comparison is in respect of two periods of six months each as the figures for two complete years are not available.

ANALYSIS OF PRODUCTION OF SINGLE YARN (Correct to nearest 1,000 lb.)

	Six months to September 14, 1936 lbs.	Six months to September 14, 1937 lbs.	Percentage change
AMERICAN-TYPE cotton yarn :			
Counts up to 40's ..	388,478,000	411,624,000	+ 6.0
Counts over 40's and up to 80's	24,603,000	27,517,000	+ 11.8
Counts over 80's ..	842,000	548,000	—34.9
EGYPTIAN-TYPE cotton yarn :			
Counts up to 40's ..	69,872,000	75,985,000	+ 8.7
Counts over 40's and up to 80's	55,193,000	56,553,000	+ 2.5
Counts over 80's ..	16,455,000	19,504,000	+ 18.5
CUT STAPLE RAYON and mixtures thereof :			
Counts up to 40's ..	8,541,000	10,656,000	+ 24.7
Counts over 40's ..	122,000	158,000	+ 29.5
TOTAL PRODUCTION AS IN TABLE NO. 2	564,106,000	602,545,000	

N.B.—The comparison is in respect of two periods of six months each as the figures for two complete years are not available.

INDIA

TWELVE MONTHS' SPINNING AND WEAVING RESULTS

In the twelve months, April, 1936, to March, 1937, the quantities of yarn and cloth manufactured were 1,054 million lbs. of yarn and 782 million lbs. of woven goods. These figures are compared in the statement below with those for the preceding two years :—

	TWELVE MONTHS, APRIL TO MARCH			INCREASE (+) OR DECREASE (—) IN 1936-37, AS COMPARED WITH CORRESPONDING MONTHS OF			
	1936-37	1935-36	1934-35	1935-36		1934-35	
	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	Per cent	1,000 lbs.	Per cent.
Yarn spun ..	1,054,117	1,059,287	1,001,420	— 5,170	—0.5	+ 52,697	+ 5.3
Woven goods manufactured..	782,316	761,552	736,649	+ 20,764	+ 2.7	+ 45,667	+ 6.2

The exports of Indian yarn by sea from British India to foreign countries during the twelve months, April, 1936, to March, 1937, were 12 million lbs., as compared with 10 million lbs. and 13 million lbs. in the corresponding periods of 1935-36 and 1934-35, respectively.

The quantity of coarse, medium, and fine yarns produced in Indian mills is compared below with the quantity imported by sea from foreign countries during the twelve months, April to March, 1935-36 and 1936-37.

TWELVE MONTHS, APRIL TO MARCH				Increase (+) or De- crease (—) in 1936-37, as compared with 1935-36		
1936-37		1935-36				
Produc- tion	Imports	Produc- tion	Imports	Produc- tion	Imports	
1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	1,000 lbs.	
'Nos. 1 to 25.. ..	740,097	422	756,258	357	—16,161	+ 65
„ 26 to 40.. ..	243,765	5,250	238,418	14,751	+ 5,347	—9,501
Above No. 40 ..	61,852	8,483	58,528	8,710	+ 3,324	— 227

The production of Indian weaving mills consists chiefly of the descriptions of goods stated below with the quantity (in thousands of pounds and their equivalents in yards) :—

TWELVE MONTHS, APRIL TO MARCH								
		1936-37		1935-36		Increase (+) or Decrease (--) in 1936-37, as compared with 1935-36		
		1,000 lbs.	1,000 yds.	1,000 lbs.	1,000 yds.	1,000 lbs.	1,000 yds.	Per cent.
Grev and bleached piece- goods—								
Shirtings and longcloth		194,909	900,680	182,247	842,844	+ 12,662	+ 57,836	+ 6.9
T-cloth, domestics, and sheetings		45,183	170,531	38,836	152,073	+ 6,347	+ 18,458	+ 16.3
Dhutis		219,768	1,117,737	234,221	1,240,511	—14,453	—122,774	— 6.2
Chadars		26,742	65,875	23,689	59,459	+ 3,053	+ 6,416	+ 12.9
Khadi, Dungri or Khaddar		39,653	126,440	37,751	116,407	+ 1,902	+ 10,033	+ 5.0
Coloured piecegoods ..		154,668	810,222	152,873	797,879	+ 1,790	+ 12,343	+ 1.2

The following statement compares the production of piecegoods in Indian mills with the imports of such goods from foreign countries :—

	TWELVE MONTHS, APRIL TO MARCH			
	1936-37		1935-36	
	Production	Imports	Production	Imports
	1,000 yds.	1,000 yds.	1,000 yds.	1,000 yds.
Grey and bleached piecegoods ..	2,761,765	481,431	2,773,492	595,181
Coloured piecegoods	810,222	282,554	797,879	351,548

DETAILED STATEMENT of the QUANTITY (in pounds) and the COUNTS (or numbers) of YARN Spun.

GRAND TOTAL, INDIA (British India and Indian States).

Count or Number	TWELVE MONTHS, APRIL TO MARCH		
	1934-35	1935-36	1936-37
1	3,904,868	3,880,361	2,823,794
2	10,512,607	11,087,430	8,516,093
3	1,828,761	2,157,812	1,840,763
4	8,693,320	7,772,023	7,879,233
5	3,047,123	3,504,200	4,169,284
6	8,309,480	8,160,496	8,178,953
7	21,025,203	20,837,356	22,817,630
8	8,864,923	11,291,706	11,691,055
9	19,624,800	19,340,795	20,613,116
10	23,898,918	22,798,196	23,427,890
TOTAL, Nos. 1 to 10	109,710,003	110,830,375	111,957,811
11	37,364,214	41,039,811	39,510,237
12	31,102,301	32,688,584	29,576,048
13	24,341,203	31,640,633	33,017,086
14	36,347,718	44,240,376	51,374,723
15	25,487,188	25,366,764	24,901,114
16	30,520,005	38,775,574	42,022,893
17	16,858,005	20,052,411	15,615,408
18	38,610,054	38,399,823	35,687,386
19	17,512,098	16,230,463	18,729,194
20	199,316,861	194,387,287	189,699,433
TOTAL, Nos. 11 to 20	463,460,247	483,721,726	480,134,122
21	42,126,279	43,351,912	38,910,127
22	45,366,920	50,584,270	48,291,324
23	11,806,318	11,395,730	12,299,701
24	46,505,214	49,168,366	41,956,812
25	5,845,707	7,204,999	6,546,654
26	21,516,817	24,608,572	25,285,153
27	5,013,722	2,626,889	1,703,034
28	18,107,971	19,541,722	17,061,869
29	6,751,455	6,420,564	5,357,259
30	79,373,109	72,880,850	71,350,097
Total, Nos. 21 to 30	282,413,512	287,783,874	268,762,050
31	1,066,631	2,089,837	2,293,291
32	20,041,710	24,299,863	26,281,748
33	591,484	751,747	471,647
34	4,332,700	5,647,253	5,170,996
35	1,808,645	3,290,583	2,029,326
36	4,509,067	4,975,999	5,909,733
37	683,459	1,221,970	1,509,803
38	5,968,126	5,371,207	8,291,777
39	334,287	449,765	553,599
40	56,707,809	64,201,035	70,435,622
TOTAL, Nos. 31 to 40	96,043,918	112,339,259	123,007,542
Above 40	43,876,496	58,528,164	61,851,698
Wastes, etc.	5,915,641	6,083,340	8,403,461
GRAND TOTAL	1,001,419,817	1,059,286,738	1,054,116,664

DETAILED STATEMENT of the QUANTITY (in pounds) and their equivalent (in yards) and DESCRIPTION of WOVEN GOODS Manufactured.

GRAND TOTAL, INDIA (British India and Indian States).

Description	TWELVE MONTHS, APRIL TO MARCH		
	1934-35	1935-36	1936-37
<i>Grey and Bleached piecegoods—</i>			
Chadars { pounds	23,196,349	23,688,903	26,742,040
{ yards	58,945,571	59,459,392	65,874,990
Dhutis { pounds	215,145,151	234,221,282	219,768,310
{ yards	1,110,043,646	1,240,510,752	1,117,797,083
Drills and jeans .. { pounds	29,525,475	32,136,569	35,786,610
{ yards	118,587,808	128,898,928	136,535,387
Cambrics and lawns .. { pounds	16,216,822	16,191,679	15,977,891
{ yards	121,714,263	129,690,723	123,774,104
Printers { pounds	3,956,941	2,944,017	2,923,383
{ yards	20,904,766	15,973,248	14,710,688
Shirtings and long-cloth .. { pounds	187,482,809	182,246,590	194,908,662
{ yards	803,484,351	842,843,691	900,080,257
T-cloth domestics, and sheetings .. { pounds	41,322,034	38,836,445	45,183,043
{ yards	161,910,444	152,072,567	170,530,913
Tent-cloth { pounds	2,504,053	3,046,110	3,958,324
{ yards	6,131,030	7,488,852	9,718,387
Khadi, Dungri or Khaddar .. { pounds	35,840,623	37,751,012	39,652,608
{ yards	106,225,904	116,406,563	126,440,306
Other varieties .. { pounds	15,531,943	16,860,329	19,634,847
{ yards	73,706,282	80,147,212	95,763,357
'TOTAL { pounds	570,722,200	587,922,936	604,535,718
{ yards	2,641,654,065	2,773,491,928	2,761,765,472
<i>Coloured piecegoods .. { pounds</i>	147,466,140	152,872,906	154,663,112
{ yards	755,801,081	797,878,975	810,221,627
<i>Grey and Coloured goods, other than piecegoods .. { pounds</i>	3,703,737	5,119,105	5,144,770
{ dozens	930,523	1,291,250	1,188,139
<i>Hosiery { pounds</i>	4,718,435	5,287,474	6,466,609
{ dozens	1,481,708	1,642,348	2,085,654
<i>Miscellaneous Cotton goods mixed with silk or wool .. pounds</i>	6,208,320	5,673,448	5,577,656
{ pounds	3,830,265	4,676,151	5,928,016
GRAND TOTAL .. { pounds	736,649,097	761,552,020	782,315,881
{ yards	3,307,456,046	3,571,370,903	3,571,987,099
{ dozens	2,412,231	2,933,598	3,273,793

JAPAN

Production of Cotton Yarn and Piecegoods.

Year and Month	Cotton textile*			Silk-Cotton Mixed Textiles*		Cotton† Piece-goods 1,000 sq. yds.
	Cotton Yarn† bales	Broad Width metre	Narrow Width piece	Broad Width metre	Narrow Width piece	
1934	3,472,442	3,689,072,817	110,016,164	3,916,253	857,141	1,793,845
1935	3,560,724	3,811,718,463	113,034,685	4,278,844	1,866,844	1,843,469
1936 May ..	308,981	295,013,135	10,913,505	335,294	171,526	152,694
June ..	308,585	311,778,664	10,205,205	549,842	137,760	155,258
July ..	294,562	311,580,435	9,066,159	364,895	228,050	150,078
August ..	291,788	325,102,227	9,305,395	444,021	266,272	147,450
September ..	290,434	304,609,657	8,564,776	326,410	242,748	143,519
October ..	298,387	304,429,887	8,686,065	368,024	292,632	145,120
November ..	318,427	319,943,087	8,321,876	373,752	281,947	154,601
December ..	326,639	317,274,426	8,817,939	435,432	299,539	157,730
1937 January ..	326,126	296,595,348	8,870,165	435,001	224,286	154,463
February ..	329,822	293,290,597	7,953,186	410,285	162,146	159,447
March ..	325,890	301,808,430	9,783,624	445,478	224,784	157,384
April ..	337,804	314,141,013	10,002,400	365,709	219,420	160,543
May ..	334,942	324,792,349	10,037,942	366,836	160,043	160,233
June ..	341,461	327,818,710	9,131,866	457,504	146,811	160,806
Jan. to June { 1937 ..	1,996,045	1,863,714,729	55,786,005	2,480,813	1,137,490	952,876
{ 1936 ..	1,787,129	1,744,535,446	59,691,881	1,968,838	853,606	902,987

* Dept. of Commerce and Industry.

† Japan Cotton Spinners' Association.

WORLD'S COTTON EXPORTS

SUMMARY OF WORLD EXPORTS, AVERAGE, 1923-24 TO 1932-33, AND ANNUAL 1933-34 TO 1936-37 (As compiled by the U.S. Dept. of Agriculture).

Exporting countries	Year ended July 31				
	Average 1923-24 to 1932-33	Quantity			
		1933-34	1934-35	1935-36	1936-37
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
United States	8,215	7,964	5,037	6,267	5,689
British India	2,759	2,771	2,623	3,094	3,700
Egypt	1,463	1,867	1,655	1,695	1,828*
Brazil	86	272	746	743	1,072*
Peru	213	267	301	381	350
Argentina	89	94	145	216	141
Total	12,825	13,235	10,507	12,396	12,789

Exporting countries	Percentage of Total				
	Per cent.	Per cent.	Per cent.	Per cent.	Per cent.
United States	64	60	48	51	45
British India	21	21	25	25	29
Egypt	11	14	16	14	14
Brazil	1	2	7	6	8
Peru	2	2	3	3	3
Argentina	1	1	1	1	1
Total	100	100	100	100	100

* From official sources. Exports for July estimated at 150,000 bales.

DESTINATION OF EXPORTS FROM PRINCIPAL EXPORTING COUNTRIES, AVERAGE 1923-24 TO 1932-33, AND ANNUAL 1934-35 TO 1936-37† (As compiled by the U.S. Dept. of Agriculture).

Destination of exports from principal exporting countries	Year ended July 31							
	Quantity				Percentage of Total			
	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37	Average 1923-24 to 1932-33	1934-35	1935-36	1936-37
	1,000 bales	1,000 bales	1,000 bales	1,000 bales	Per cent.	Per cent.	Per cent.	Per cent.
<i>Exports from the United States to—</i>								
Germany*	1,860	359	806	682	23	7	13	12
United Kingdom ..	1,794	763	1,461	1,189	22	15	23	21
France	866	399	724	687	10	8	12	12
Italy	712	499	400	414	9	10	6	7
Spain	304	262	223	(1)	4	5	4	(§)
Belgium	196	103	167	163	2	2	3	3
U.S.S.R. (Russia) (d)	219	115	(1)	1	3	2	(§)	(§)
Netherlands	141	61	72	93	2	1	1	2
Sweden	60	92	89	93	1	2	1	2
Portugal	46	47	55	40	1	1	1	1
Poland and Danzig ..	27	224	279	184	(§)	4	4	3
Other Europe	65	102	103	132	(§)	3	2	2
Total Europe	6,290	3,026	4,379	3,678	77	60	70	65
Canada	210	233	255	318	2	5	4	6
Japan	1,316	1,587	1,543	1,612	16	32	25	28
China	86	113	38	15	4	2	(§)	(§)
British India	24	51	7	14	1	1	(§)	(§)
Other countries	19	27	45	52	(§)	(§)	1	1
Total	8,215	5,037	6,267	5,689	100	100	100	100

* Includes shipments through the free port of Bremen, much of which is afterwards reshipped to other countries. According to German official trade returns, imports of American cotton for consumption in Germany amounted to 232,000 bales in 1936-37; 422,000 bales in 1935-36; and 362,000 bales in 1934-35.

(†) Bales of 478 pounds net except for the United States, which are in bales of 500 pounds gross

(§) Less than 500 bales.

(§) Less than 0.5 per cent.

CHINA COTTON EXPORTS

Season 1936-37

From 1st September, 1936, till 31st August, 1937

(in bales of about 500 lbs.)

Exporters :	Europe	U.S.A. etc.	Grand Total
Volkart Brothers	2,919	21,461	24,380
Jardine Matheson & Co. ..	86	7,360	7,446
Tientsin Anlee Export Co. ..	1,370	4,825	6,195
Lingshaw & Co.	—	4,500	4,500
Collins & Co. Ltd.	80	4,185	4,265
North China Exp. Pro. Co. ..	213	3,850	4,063
Perrin Cooper & Co.	469	2,825	3,294
Liddell Bros. & Co. Ltd. ..	425	2,335	2,760
Carlowitz & Co.	1,741	—	1,741
Independent Trading Co. ..	244	1,100	1,344
14 Sundry Shippers	4,548	1,922	6,470
Total	12,095	54,363	66,458

(Figures supplied by Messrs. Volkart Bros.)

UNITED STATES COTTON CONSUMPTION

The U.S. Census Bureau report that the consumption of lint cotton by domestic mills in October amounted to 526,000 bales, against 602,000 bales in September and 646,000 bales in October last year, making 1,732,000 bales so far this season, against 1,851,000 bales a year ago. Exports for the month are returned at 799,000 bales, excluding linters, against 617,000 bales in September and 861,000 bales in October last year, making 1,636,000 bales so far this season, against 1,613,000 bales to the same date last season.

Stocks in the hands of manufacturers amount to 1,419,000 bales, against 991,000 bales last month and 1,403,000 bales in the corresponding month last year, and in outside warehouses to 9,758,000 bales, against 6,926,000 bales and 8,028,000 bales. Spindles active during the month of October totalled 23,724,000, against 23,887,000 in September and 23,638,000 in October last year.

MISCELLANEOUS

DEFINITION OF TEXTILE TERMS

The Textile Institute recently launched its scheme for the authoritative definition of textile terms and the unification of textile-testing methods on a scientific basis.

Mr. Hugh L. Robinson, the general secretary of the institute, said recently that 1,500 copies of the scheme had been distributed to members of trade organisations, chambers of commerce, and combines and large firms. Representatives of each of these three groups had expressed their willingness to be represented on a special committee, and promises of financial support had been received. The scheme had already been discussed with trade representatives in London, Bradford and Birmingham, and appointments had been made for similar talks in Dundee and Belfast.

Some misunderstanding, however, had arisen about the nature of the scheme. There was no intention to set up standard fabrics, marked as such, or for the institute to establish a testing-house of its own or to undertake the preparation of fabric specifications for public or private interests. The objects of the scheme had been described as falling under three heads: (1) the definition of terms; (2) unification of testing methods; (3) advice on specifications. To avoid further misunderstanding the meaning of these three headings is now explained as follows:—

Definition of terms: to include unification of expression of results. The aim here is to get all sections of the textile trade to use the same terms and the same methods of expressing test results. At a later stage it is hoped agreement may be reached with other countries.

Unification of testing methods: This is the most important section of the field of work. Its object is to frame unified methods of testing the properties of fibres, yarns, and fabrics which will be acceptable to all sections of the trade. Where agreement is unobtainable and another method of testing is employed, a description of the method is to be specified. Such an achievement will do much to enable parties to settle their disputes satisfactorily, and may even prevent disputes arising.

Advice on specifications: To give advice on the technical and scientific accuracy of specifications used by public bodies, such as Government departments, municipal authorities, railways, hospitals, etc.

Attention is drawn here to the word "advice." The institute does not intend drawing up specifications for goods supplied to public bodies, but only to advise on the scientific and technical accuracy of such existing

specifications. In this way the institute will be safeguarding trade interests in that it will only agree to those technical specifications "which its specially constituted ad hoc committees" are satisfied come within the bounds of normal commercial practice.

No section of the work thus defined will be submitted for recognition as a British standard until sanctioned by the Representative Advisory Committee, which, in its capacity as a representative trade committee, will have power over all such proposals. This committee is thus a filter which separates the desirable from the undesirable in matters of trade interest. The institute's scheme thus protects trade interests by undertaking to give its extensive and expert technical advice in a well-defined commercial controlled field of work.

We regret that owing to a printer's error, one of the spindles shown in Messrs. Wm. Bodden & Sons' advertisement in our July issue, was printed upside down.

Obituary

SIR GEORGE HOLDEN, BART.

It is with very deep regret that we have to record the death of Sir George Holden, Bart., which took place at his home at Leigh, Lancashire, on September 26 last. Sir George was until recently one of the English representatives on the Joint Egyptian Cotton Committee and was well respected by all with whom he came into contact. He was a Past-President of the Bolton Master Cotton Spinners' Association and had represented that body on the Executive Committee of the Federation of Master Cotton Spinners' Associations. He occupied the position of managing director of Combined Egyptian Mills Ltd.

MR. SORABJI M. RUTNAGUR, M.R.S.A., J.P.

We regret to have to announce the death at the age of 72 at Bombay on July 20, 1937, of Mr. Sorabji Muncherji Rutnagur, M.R.S.A., J.P., the founder and editor of the *Indian Textile Journal*. For a continuous period of 47 years, Mr. Rutnagur had maintained its editorial columns at a high level, and the *Journal* today enjoys uniform prestige and influence not only among all classes of Indian mill-owners and the technical mill staff but amongst readers in England and other countries.

Reviews on Current Cotton Literature

The October issue of the "EMPIRE COTTON GROWING REVIEW" contains many noteworthy features, prominent amongst which is an extremely interesting account of Cotton Growing in the Belgian Congo, by Mr. A. C. de Bauw, Managing Director of the Compagnie Cotonnière Congolaise. The Review is published quarterly (annual subscription 5s. post free), for the Empire Cotton Growing Corporation, by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1.

"WORLD PRODUCTION AND PRICES, 1936/37," published by the League of Nations, Geneva. Obtainable in England from Messrs. Allen & Unwin, 40 Museum Street, London, W.C.1, price 5s.

This annual volume, just published by the Economic Intelligence Service of the League of Nations, is an authoritative review of the situation as regards world production of both primary and industrial products, as well as of price movements of such products, both wholesale and retail. A section of the volume is devoted to world trade and shipping, which deals with quantum changes in national trade and the situation in the freight market. An important feature of the volume is the attention given to stocks of primary commodities. An index of such stocks has been prepared for the volume as a necessary link between the revised world index of primary production and the new world index of industrial activity which were published in the last edition of the volume. This index of stocks is more comprehensive and exact than any previous one.

"DAVISON'S TEXTILE BLUE BOOK, 1937" (United States, Canada and Mexico). Published by the Davison Publishing Co., 50 Union Square, New York.

The seventy-second annual edition of this most useful directory has recently come to hand. It contains statistics arranged by States, showing the number of spindles, looms, cards and combers in the mills; particulars of textile associations; an index to raw cotton merchants; cotton warehouses; textile mill suppliers, etc. Prices, delivered: Office edition, \$7.50. Handy edition \$5.00. Salesmen's Directory \$4.00. Foreign countries, 50 cents extra.

"INDUSTRIAL FIBRES," compiled by the Imperial Economic Committee. Printed and published by H.M. Stationery Office, London. Price 2s. 6d. net. 2s. 9d. post free.

This review is one of a series designed to present, in convenient form, summaries of production, international trade and consumption for a group of allied commodities, with special reference to the part played by the countries of the British Commonwealth of Nations. The commodities dealt with in the book are cotton, wool, mohair, silk, flax, jute, hemp and rayon.

"SKINNERS' COTTON TRADE DIRECTORY, 1937/38." The fifteenth issue of this invaluable reference book has recently come to hand. The customary revision of details, in collaboration with the leading textile associations throughout the world, has been carried out and valuable additions have been made to the information previously published; in particular, the editorial relating to foreign companies has been considerably augmented. The usual comprehensive particulars are given in respect of cotton spinners, manufacturers and doublers, cotton importers and exporters, finishers, merchants, textile machinists, etc. The Hosiery and Knit Goods Manufacturers' Section has been completely revised and materially extended in this issue. The publication is priced at 20s. net and may be obtained from the publishers at 49 Deansgate, Manchester.

"THE YORKSHIRE TEXTILE INDUSTRY, 1937/38." Printed and published by Messrs. John Worrall Ltd., Oldham. Price 15s. post free. Abroad 17s. net.

The fifty-third annual edition of this authoritative Reference Book and Market Guide of the textile trade of Yorkshire has recently been published and will undoubtedly prove to be of great assistance to all those desiring information covering the separate activities of the Yorkshire textile industry. Full particulars are included of all wool, worsted, cotton, silk and rayon spinners, manufacturers, bleachers, dyers and finishers in the country.

"UNION COTONNIÈRE," Gand, Belgium. Nothing gives us greater pleasure than to receive from members of our various affiliated associations, evidence of the progress made by these concerns over a period of years—progress made as a result of sheer hard work combined with a far-seeing and sound business policy on the part of the management. Such a book has recently been published and sent to us by our friends at Union Cotonnière, Gand. Since the company was formed in 1919, the spindleage has risen from 167,483 to 265,000, producing annually 13 million kilos of single yarn. The company also owns 53,000 doubling spindles which have an annual output of 4 million kilos of doubled yarn. During the course of its existence the company has acquired various manufacturing units, whose annual output amounts to 190,000 pieces.

"ANNUAL COTTON HANDBOOK, 1937/38," published by Messrs. Comtelburo Ltd., 11 Tokenhouse Yard, London, E.C.2. Price 5s. 2d. post free.

The sixty-seventh issue of this well-known publication fully maintains the high standard set by its predecessors. As a reference book it is invaluable to all who require comprehensive and up to date statistics concerning all aspects of the cotton industry. Statistics are given for all growths of cotton for which figures are available, and the handbook provides much useful and reliable information concerning cotton and the cotton industry in all parts of the world.

BOOKS RECEIVED

"ANNUAL REPORT OF THE COMMITTEE OF THE INDIAN CHAMBER OF COMMERCE," Calcutta, for the year 1936.

"AGRICULTURAL STATISTICS, 1937." Published by the United States Department of Agriculture.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN BELGIUM," together with an annex on the Grand Duchy of Luxembourg. By the Commercial Counsellor to H.M. Embassy at Brussels and H.M. Consul at Luxembourg. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 2s. net.

"COTTON SEED AND ITS PRODUCTS." Published by the National Cotton-seed Products Association, Memphis, Tenn., U.S.A.

"REPORT OF THE MILLOWNERS' ASSOCIATION," Bombay, 1936/37.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN ALGERIA," by G. P. Churchill, C.E., lately H.M. Consul-General at Algiers. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, Adastral House, Kingsway, London, W.C.2. Price 9d. net.

"THE NORTHERN COUNTRIES IN WORLD ECONOMY" (Denmark, Finland, Iceland, Norway, Sweden). Published by the Delegations for the promotion of economic co-operation between the Northern Countries. Printed by the Otava Printing Office, Finland.





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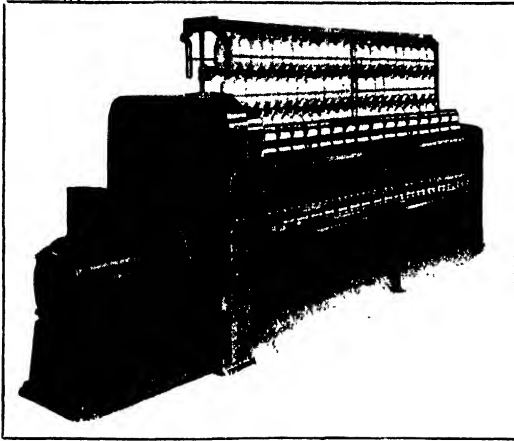
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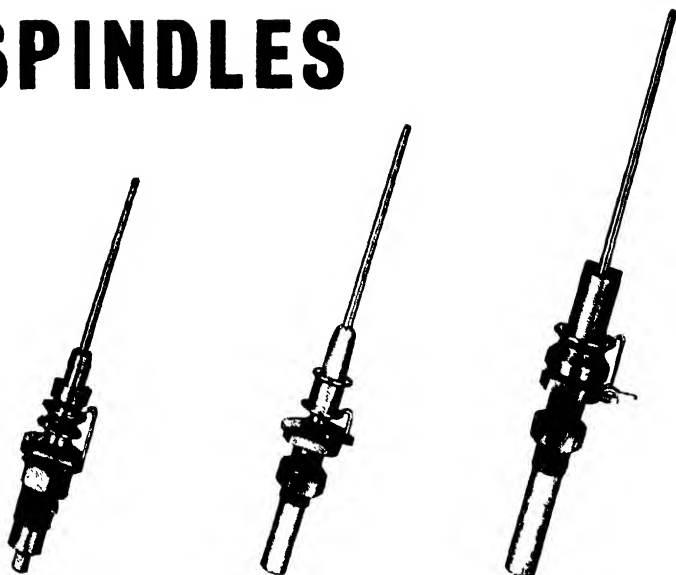
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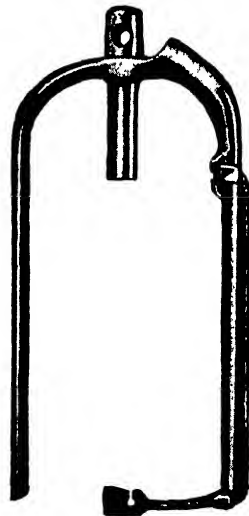
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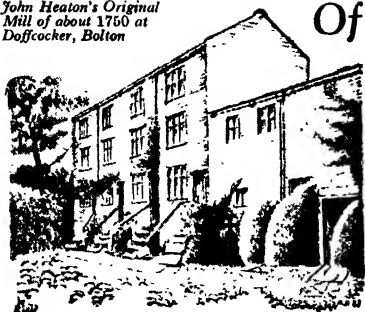
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COMMITTEE'S COMMUNICATIONS

XVIII INTERNATIONAL COTTON CONGRESS, CAIRO-ALEXANDRIA, JAN.-FEB., 1938

By the time that this issue of the *Bulletin* is in the hands of our readers, the XVIII International Cotton Congress, which is being held on this occasion in Egypt, will have concluded, and we trust that the cotton industry as a whole will benefit from the results of its deliberations.

The Congress was opened in Cairo on January 26, and the Sessions continue until Thursday, February 3. H.M. King Farouk officially performed the Inaugural Ceremony at the Royal Opera House. Between 350-400 delegates, from more than twenty of the world's leading textile countries, are taking part.

At the business sessions, over thirty papers will be presented, dealing with present day problems affecting every phase of cotton growing and research, the production of staple fibre in Germany, the British Textile Institute's plan for standardisation in textiles, the cultivation of cotton in Central Africa, the future of cotton exports from the U.S.A., recent textile machinery improvements, the Humidity Agreement for Egyptian cotton, the formulation of a uniform method of testing for moisture in raw cotton, new uses and propaganda for cotton and the effects of the 40-hours' week on the French cotton industry.

We hope to publish, as soon as possible after the termination of the Congress, a full report containing a verbatim account of the proceedings, together with copies of all the papers submitted for discussion. The report will be distributed gratis to all members of the International Federation, and will be offered for sale to non-members.



AUSTRIA.

COTTON SPINNING.

According to statistical reports available up to and inclusive of October, employment in the spinning mills has remained fairly stable. New sales also have remained approximately on the average level of previous months this year. Sales for October, as compared with the same month in 1936, show a decline of about 20 per cent., which is wholly accounted for by the loss in export trade. According to the foreign trade figures for the first ten months of the year, *imports* of cotton yarns were :—

	1937	1936
Unbleached yarns	9,039 mq.	13,872 mq.
Bleached yarns	2,000 „	2,349 „
Dyed yarns.. .. .	2,666 „	2,066 „
	<u>13,705 mq.</u>	<u>18,287 mq.</u>

mq. = metric quintal = 100 kilos (220 lbs.).

Imports have therefore fallen by 4,582 mq. or 25 per cent.

The *exports* were :—

	1937	1936
Unbleached yarns	107,774 mq.	100,959 mq.
Bleached yarns	4,273 „	2,460 „
Dyed yarns.. .. .	1,021 „	688 „
	<u>113,068 mq.</u>	<u>104,107 mq.</u>

The exports therefore show an increase of 8,961 mq. or 8.6 per cent.

COTTON MANUFACTURING.

Statistics covering a period up to the middle of September show that in this section also the rate of employment has remained fairly stable, but a fairly severe decline was noticeable for October and November, which led to limitation in production to the extent of about 20 per cent.

The foreign trade figures in cotton fabrics were :

Cloth imports in metric quintals for 10 months.

	1937	1936
Unbleached	18,645	15,038
Bleached	1,689	1,204
Dyed	1,394	1,006
Printed	994	827
Fancy woven	1,258	1,517
	<u>23,980</u>	<u>19,592</u>

Consequently, imports have risen by 4,388 mq. or 22.4 per cent.

Exports of cotton cloths were as follows :—

	1937	1936
Unbleached	602	813
Bleached	4,507	4,469
Dyed	930	601
Printed	2,204	1,860
Fancy woven	2,581	2,133
	<hr/> 10,824	<hr/> 9,876

Consequently, exports rose by only 948 mq. or 9.6 per cent.

As regards the trade prospects for the cotton spinning and weaving industry for the near future, the signs point to some further regression in the inland market, due to the general state of trade.

As regards exports of cotton yarns, it is extremely difficult to make a forecast, because the uncertainty governing the trade relations with the consuming countries in question may contain the possibility of a renewed increase or of a sharp decline.

The number of workpeople employed in the spinning and weaving industry has shown a not unimportant decline during the last few weeks, and an aggravation of the situation must be expected if the home demand for fabrics should fail to revive.

In neither section have wage conditions altered noticeably.

The original text in German runs as follows :—

BAUMWOLLSPINNEREI :

Die Beschäftigung der Spinnereien ist nach den statistischen Ausweisen, welche bis einschliesslich Oktober vorliegen, ziemlich stabil geblieben. Auch die Neu-Verkäufe haben sich ungefähr auf dem Durchschnittsniveau der bisher abgelaufenen Monate des Jahres gehalten. Allerdings zeigt der Absatz des letzten Berichtsmontates Oktober gegenüber dem gleichen Monate des Jahres 1936 einen Rückgang um zka. 20%, der ausschliesslich auf das Exportgeschäft entfällt. Nach der Aussenhandelsstatistik für die ersten 10 Monate des Jahres hat sich die *Einfuhr* von Baumwollgarnen wie folgt gestaltet :—

EINFUHR

	1937	1936
Rohgarne	9,039 mq.	13,872 mq.
Gebleichte Garne	2,000 „	2,349 „
Gefärbte Garne	2,666 „	2,066 „
	<hr/> 13,705 mq.	<hr/> 18,287 mq.

Sohin ist ein Rückgang in der Einfuhr um 4,582 mq. oder 25% eingetreten.

Die *Ausfuhr* hat sich wie folgt entwickelt :—

AUSFUHR

	1937	1936
Rohgarne	107,774 mq.	100,959 mq.
Gebleichte Garne	4,273 „	2,460 „
Gefärbte Garne	1,021 „	688 „
	<hr/> 113,068 mq.	<hr/> 104,107 mq.

daher Mehrausfuhr 8,961 mq. oder 8.6%.

BAUMWOLLWEBEREI.

Die bis Mitte September vorliegende Statistik zeigt, dass der Beschäftigungsumfang ebenfalls ziemlich stabil geblieben ist, doch muss festgestellt werden, dass in den Monaten Oktober und November ein ziemlich starker Rückschlag eintrat, welcher auch zu entsprechenden Betriebseinschränkungen im Ausmasse von zka, 20% Veranlassung gab.

Die Aussenhandelsbewegung in Baumwollgeweben zeigt folgendes Bild :

Gewebe-Einfuhr in mq. für 10 Monate.

	1937	1936
Roh	18,645	15,038
Gebleicht	1,689	1,204
Gefärbt	1,394	1,006
Bedruckt	994	827
Buntgewebt	1,258	1,517
	<hr/> 23,980	<hr/> 19,592

Demnach ist die Einfuhr um 4,388 mq. oder 22.4% gestiegen.

Dem gegenüber hat die *Ausfuhr* von Baumwollgeweben sich wie folgt entwickelt :—

	1937	1936
Roh	602	813
Gebleicht	4,507	4,469
Gefärbt	930	601
Bedruckt	2,204	1,860
Buntgewebt	2,581	2,133
	<hr/> 10,824	<hr/> 9,876

Die Ausfuhr ist sohin nur um 948 mq. oder 9.6% gestiegen.

Was die geschäftlichen Aussichten der Baumwollspinn- und Webindustrie für die nächste Zukunft betrifft, so ist hinsichtlich des Inlandsabsatzes eher mit einem weiteren Abflauen zu rechnen, was in der allgemeinen Geschäftslage begründet erscheint.

Hinsichtlich des Exportes von Baumwollgarnen ist eine Voraussage ausserordentlich schwierig, weil bei der Unsicherheit der handelspolitischen Beziehungen zu den in Frage kommenden Absatzländern sowohl die Möglichkeit eines Wiederansteigens, als auch die eines empfindlichen Geschäftsrückganges gegeben erscheint.

Die Zahl der Beschäftigten in der Spinn- und Webindustrie hat in den allerletzten Wochen einen nicht unerheblichen Rückgang erfahren, mit dessen Verschärfung gerechnet werden muss, für den Fall, als der inländische Gewebekonsum keine Belebung erfahren sollte.

Die Lohnverhältnisse haben sich weder in dem einen noch in dem anderen Industriezweig nennenswert geändert.

(Verein der Baumwollspinner und Weber Österreichs, Wien)

BELGIUM.

The effects of the general falling-off in trade have been keenly felt by the cotton industry. The general causes of the depression are further accentuated, as far as our industry is concerned, by the weakness and

uncertainty of raw cotton prices on the one hand, and on the other hand by the reduction in the degree of activity which usually occurs about the end of the year.

Without taking into account the considerable sales of yarn which were made during the first few days of October, when a sudden momentary rise occurred in the market, business is becoming harder and harder to obtain, as customers are exercising great caution. Order books are becoming empty and the rhythm of deliveries has been seriously slowed down.

As a result, stocks of yarn have accumulated, and certain spinners are commencing short-time measures.

Since the general increase in wages in October last, a new agreement has been made with a view to raising wage rates of workers employed on successive shifts.

The original text in French runs as follows :—

Les répercussions du ralentissement général des affaires sont vivement ressenties par l'industrie cotonnière. Aux causes générales de dépression viennent en effet s'ajouter, pour notre industrie, d'une part la faiblesse des cours du brut et l'incertitude quant à leurs tendances prochaines ; d'autre part, la diminution d'activité qui se produit normalement en fin d'année.

Si l'on met à part des ventes massives de filés qui ont eu lieu, pendant quelques jours au début d'octobre, à l'occasion d'un redressement brusque et momentané des cours, les transactions se font de plus en plus rares, la clientèle faisant preuve d'une grande réserve.

Les carnets d'ordres se dégarnissent et le rythme des livraisons ralentit sérieusement.

Il en résulte une augmentation persistante des stocks de filés, et certains filateurs commencent à chômer.

Depuis la majoration générale des salaires, faite en octobre dernier, un nouvel accord a été conclu en vue de relever les taux des salaires pour les ouvriers travaillant en équipes successives.

(Association Belge des Filateurs de Coton)

CHINA

According to a publication issued by the United States Department of Agriculture Bureau of Agricultural Economics, the rate of cotton consumption in China is believed to be only a small fraction of that which prevailed previous to the commencement of hostilities. Some mills in the Shanghai area are expected to re-open in the near future if conditions become more settled, but at the present time mill activity in Shanghai is reported to be only about 20 per cent. of capacity. About 40 per cent. of the spindles at Tientsin and 25 per cent. at Hankow are in operation, and at Tsingtau and Tsinan no mills are believed to be running. Foreign purchases and imports of foreign cotton are negligible.

CZECHO-SLOVAKIA.

The degree of occupation the Czecho-Slovakian cotton industry has been retarded during the fourth quarter of the year. The demand for yarns in the home market was unsatisfactory. The export business has, however, somewhat improved.

The import and export figures for the fourth quarter of last year, together with the comparison for 1936, will be found below, following the original report in German.

Die Beschäftigung der csl. Baumwollspinnereien ist im IV. Quartal des Jahres zurückgegangen. Die Nachfrage nach Garnen war am Inlandsmarkte weiter unbefriedigend. Das Exportgeschäft hat sich etwas gebessert.

Der Umfang des Aussenhandels ist aus folgenden Daten zu erschen :

				III. Quartal (Third quarter)	
				1937	1936
				(100 Kg.)	
EINFUHR (Imports) :					
Baumwollgarne (Cotton yarns)	..	..		8·712	4·101
Baumwollwaren (Cotton goods)	..	..		7·843	5·024
Zusammen (Total)	..	..	..	<u>16·555</u>	<u>9·125</u>
AUSFUHR (Exports) :					
Baumwollgarne (Cotton yarns)	..	..		35·582	38·239
Baumwollwaren (Cotton goods)	..	..		32·791	25·570
Zusammen (Total)	..	..	..	<u>68·373</u>	<u>63·809</u>

ENGLAND.

Towards the close of the quarter ending December 31st, business in the spinning section tended to lag, due to seasonal and other causes, and some machinery, particularly in ring spinning departments, was temporarily stopped.

Manufacturers are regarding the prospects of the cotton manufacturing section with considerable anxiety. For some months past, the lack of orders has been a discouraging feature and is now being reflected in the activity of the mills, as orders booked some time ago have been woven out and stocks are accumulating. Particularly is the falling-off in trade noticeable in the export market, and shipments abroad remain at an unsatisfactory level ; the home market has also weakened, especially in the bulk lines, and orders are generally for specialities.

The fall in raw cotton prices and the disturbed international position have led to lack of confidence amongst buyers, and until this is restored there will be much apprehension regarding future trade.

FRANCE.

The slight increase in mill activity which was noticeable in September and the beginning of October, following the depreciations in the franc which occurred at the end of June and during September, has only been a very fleeting one, and during the course of the last two months of the quarter under review, the state of trade in the French cotton industry has gradually become much worse.

Certain firms have already reduced hours of work to less than forty per week and there is already the prospect of the application of general short-time working in the various cotton centres in the future.

The degree of activity of the trade could be estimated at the end of October—the last month for which statistics are available—at 89%,* taking into account machinery completely stopped and the partial short-time working instituted by certain firms. This figure of 89% applies equally to the spinning and weaving sections, but it is probable that it will show a reduction when the December returns are to hand.

Since the publication of the last issue of the *Bulletin*, wages in Normandy have risen by about 7½% compared with what they were previously.

* With the exception of a certain number of spinning and weaving mills completely closed.

The original text in French runs as follows :

Le petit regain d'activité que l'on avait constaté en septembre et au début d'octobre, à la suite des dépréciations du franc intervenues fin juin et courant septembre, n'a été que très momentané et, au cours des deux derniers mois du trimestre en revue, la situation de l'industrie cotonnière française s'est progressivement et considérablement aggravée.

Certaines firmes ont déjà réduit la durée du travail à un chiffre inférieur à 40 heures par semaine et l'on envisage dans les diverses régions cotonnières l'application prochaine d'un short-time généralisé.

Le pourcentage d'activité des usines, compte-tenu de l'outillage complètement arrêté et du chômage partiel pratiqué par certains établissements, pouvait être évalué à fin octobre—dernier mois dont les statistiques sont connues—à 89%* tant pour la filature que pour le tissage ; mais il est vraisemblable qu'en décembre ce pourcentage sera moins élevé.

Depuis la publication du dernier *Bulletin*, une augmentation de salaires, d'environ 7,5% par rapport aux salaires précédemment payés, est intervenue en Normandie.

(Syndicat Général de l'Industrie Cotonnière Française)

* Compte non tenu d'un certain nombre de filatures et de tissages complètement fermés.

IMPORTATIONS ET EXPORTATIONS.

IMPORTS AND EXPORTS

						Troisième trimestre Third quarter	
						1936	1937
						Quintaux Métriques (In metric quintals)	
A—Imports : (Imports)							
1.	Fils de coton					1,546	3,068
	(Cotton Yarn)						
2.	Tissus de coton					2,196	3,786
	(Cotton Piecegoods)						
B—Exports : (Exports)							
1.	Fils de coton : Exportations totales .. .					13,759	15,423
	(Cotton Yarn—Total Exports)						
Destinations : (Countries of Destination)							
	Algérie, Colonies et Pays de Protectorat ..					4,958	5,296
	(Algeria, Colonies and Protectorates)						
	Marchés étrangers					8,801	10,127
	(Foreign markets)						
2.	Tissus de coton : Exportations totales ..					99,568	92,159
	(Cotton Piecegoods—Total Exports)						
Destinations : (Countries of Destination)							
	Algérie, Colonies et Pays de Protectorat ..					93,481	85,633
	(Algeria, Colonies and Protectorates)						
	Marchés étrangers					6,087	6 526
	(Foreign markets)						

GERMANY.

SPINNING SECTION

The commercial situation in the German cotton spinning industry has shown no material change during the last quarter of 1937, as compared with the previous quarter.

Orders and deliveries of yarn as well as the degree of activity of the industry remained on the whole as reported in the last issue of the *Bulletin*.

The original report in German runs as follows :—

Die geschäftliche Lage der deutschen Baumwollspinnereien hat im letzten Vierteljahr 1937 gegenüber dem vorausgegangenen Vierteljahr eine bemerkenswerte Änderung nicht erfahren.

Sowohl der Auftragseingang und Versand an Garnen, wie auch der Beschäftigungsgrad der Betriebe blieben im wesentlichen auf dem bisherigen Stand.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

MANUFACTURING SECTION.

The amount of orders received during the last quarter of 1937 was greater than that of the third quarter. Demand in respect of both old and new cloth contracts was particularly lively. Both these circumstances led to an increase of about 5 per cent. in the degree of activity in the manufacturing section.

The original report in German runs as follows :—

Der Auftragseingang war im letzten Vierteljahr 1937 grösser als im 3. Vierteljahr. Der Abruf auf alte und neue Gewebe-Kontrakte war besonders lebhaft. Beide Umstände führten zu einer Erhöhung des Beschäftigungsgrades der Webereien um etwa 5%.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei)

ITALY.

The following are index numbers representing activity in the Italian cotton industry during recent years. The year 1928 is taken as the basic year, i.e., 100 : -

COTTON SPINNING												
Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec. M'nthly Average
1935..	80 -	85 -	86,5	86,2	85,3	92,8	84,7	72,8	86 -	85,6	85,6	77 84,5
1936..	77,5	79,6	78,2	72,4	75 -	67,9	58,9	43,7	63 -	66,5	71,5	80,2 69,5
1937..	81,9	88,8	92 -	95,1	98,6	98,7	95,3	76,5	95,6	96,4	94,1	
COTTON MANUFACTURING												
1935..	77,2	79,4	84,4	85,8	87,9	89,8	85,3	76,1	90	90,1	86 -	77 - 84,1
1936..	79,1	80,1	82 -	77,7	80,2	77,3	73,5	58,5	70,4	75,6	77,3	76,8 75,7
1937..	79,4	87,8	93,9	94,1	70,6	97,8	96	78,9	95,3	98,7	94,1	

According to the Business and Financial Report of the Association of Italian Corporations for December, 1937, the Italian cotton spinning industry, which in 1934 was using barely 10% of substitute fibres, is now using 48%.

JAPAN.

According to a British United Press message from Tokio recently, the Japan Cotton Spinners' Association has reduced operations in the manufacture of cotton goods by one-third. Mills are operating at 63.8 per cent. of normal capacity.

MEXICO.

Cotton-mill production during the third quarter of 1937 showed a tendency to increase slightly, but retail demand for cotton textiles diminished, and mill stocks at the end of September were understood to be seasonally high. The Mexican Government is reported to be planning to peg the price of domestic cotton, but mill operators are of the opinion that any increase in cotton textile prices will limit sales.

(United States Dept. of Commerce)

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS :

6th Sept.—3rd Oct., 1937	..	111.52%	of full time production (48 hours).			
4th Oct.—31st Oct., "	..	109.89%	"	"	"	"
1st Nov.—28th Nov., "	..	106.52%	"	"	"	"

EXPORTS :

		Cotton yarn		Piecegoods		Clothing
		value	weight	value	weight	weight
		zl.	kg.	zl.	kg.	kg.
September, 1937	..	—	—	1,268,510	277,755	60,758
October, "	..	—	—	838,143	147,159	70,163
November, "	..	—	—	604,827	126,850	82,619

SWEDEN.

A certain pessimism has made itself felt during the last two months due to a slackening-off of the retail trade demand. This can be traced back to a slight surplus, caused by overdue buying during the first part of the year, when prices of raw materials were going up. As soon as the present, quite normal consumption has removed this surplus, things will probably correct themselves, at least up to a certain point.

No alterations have taken place in regard to rates of wages paid to spinners and weavers.

SWITZERLAND.

The lack of interest in the whole market for half finished and finished goods, which has been occasioned by the fall in cotton prices, has become considerably greater during the quarter under review. The spinning mills were in the main assured of normal working under old contracts, but in isolated cases a limitation of production could not be avoided, because buyers were very dilatory in some instances in taking delivery under contracts. In doubling mills the work available has fallen suddenly to about 60 per cent. of normal capacity and even of this low production a portion has to be placed into stock for the time being. The weaving sheds were also obliged to curtail production over the whole industry. The gloomy situation is clearly illustrated by the decision of the Swiss Federation of Spinners, Doublers and Weavers to increase again the collective curtailments up to 25 per cent. from February 1, 1938.

The basic wages, calculated over the whole year 1937 and for all workers, showed an average rise of 3%.

The original report in German runs as follows :—

Die durch die Baumwollbaisse ausgelöste Interesselosigkeit am gesamten Markte für Halb- und Ganzfabrikate hat sich im Berichts-Quartal bedeutend verschärft. Den Spinnereien war zwar zur Hauptsache noch normale Beschäftigung durch alte Kontrakte gesichert, was indessen

vereinzelt Produktionseinschränkungen nicht völlig zu verhüten vermochte, weil die Käufer sich in der Kontraktabnahme zum Teil sehr saumselig zeigten. Schlagartig sank die Arbeitsmöglichkeit in der Zwirnerei auf ca. 60% der normalen Kapazität und selbst ein Teil dieser geringen Produktion muss einstweilen auf Lager gelegt werden. Die Weberei musste auf der ganzen Linie ebenfalls Betriebsreduktionen vornehmen. Die trübe situation wird am deutlichsten illustriert durch den Beschluss des Schweiz. Spinner-, Zwirner- und Weber-Vereins, die Kollektiveinschränkungen ab 1. Februar 1938 wiederum bis zu 25% zu erhöhen.

Die Grundlöhne erfuhren, auf das ganze Jahr 1937 und die gesamte Belegschaft berechnet, eine Erhöhung von durchschnittlich drei Prozent.

U.S.A.

The Bureau of the Census announces that, according to preliminary figures 26,704,476 cotton spinning spindles were in place in the United States on December 31, 1937, of which 22,328,472 were operated at some time during the month, compared with 22,791,550 for November, 23,724,272 for October, 23,886,948 for September, 24,353,102 for August, 24,394,300 for July and 24,083,306 for December, 1936.

The aggregate number of active spindle hours reported for the month of December was 5,726,020,185. Since the inauguration of this inquiry in 1921 the average hours of operation for the day shift for all of the mills was used in computing the monthly percentage of activity. The hours of employment and of productive machinery are not uniform throughout the industry. However, in order that the statistics may be comparable with those for earlier months and years, the same method of computing the percentage of activity has been used. Computed on this basis the cotton spindles in the United States were operated during December, 1937, at 92.0 per cent. capacity on a single-shift basis. This percentage compares with 105.2 for November, 111.1 for October, 124.1 for September, 130.5 for August, 121.9 for July, and 135.4 for December, 1936. The average number of active spindle hours per spindle in place for the month was 214.



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ALGERIA

The damage caused by *Farias* is considerable. A crop of 10,600 centals of unginned cotton is expected as compared with 4,470 centals last year, or an increase of 135 per cent. The area was increased by 140 per cent. (1,200 acres against 510 acres in 1936-37). Production of lint is about 3,640 centals (760 bales) against 1,540 centals (320 bales) in 1936-37 and a 1931-32/1935-36 average of 1,480 centals (310 bales); percentages, 235.7 and 246.3. The average, however, includes four years with little or no production. In the period 1926-27/1930-31 Algeria produced an average of 29,000 centals (6,000 bales), or that is, eight times as much as this year.

(International Institute of Agriculture)

ARGENTINA.

The National Cotton Board of the Argentine Ministry of Agriculture has recently issued final figures for the total production of cotton in the Republic during the season 1936-37. The last crop is put at 142,000 bales, against 367,000 bales in 1935-36, showing the deplorable extent to which the crop has suffered progressively from the continued drought. At one time it was feared that lack of moisture would seriously prejudice the prospects of the 1937-38 crop, which is now being planted, but, fortunately, heavy rains have saved the situation and conditions over the greater part of the Argentine cotton belt are now rapidly returning to normal after an anxious period. The drought persists in the provinces of Santiago del Estero and Catamarca, but they normally grow between them only about 10 per cent. of the Argentine crop, so that the fact that they have had no rain for twelve months is of secondary importance so far as the total production is concerned. In spite of last year's disaster and of the present low level of world cotton prices, Argentine farmers are increasing their cotton acreage and reports from all the cotton-growing districts are unanimous in stating that, now that the rains have made farm work possible, a tremendous amount of energy and enthusiasm is being displayed even in districts where little or no cotton has been raised in previous years.

(Manchester Guardian)

The National Cotton Board has published the second official estimate of the area sown to cotton in Argentina in the agricultural year 1937-38, the area being placed at 419,030 hectares, which represents a decline

of 12 per cent. on the first estimate of 477,900 hectares published early in December last. The reduction is attributed to the continuance of the drought and to late frosts which have destroyed some of the early sowings.

(Bank of London and South America)

AUSTRALIA.

Cotton production in 1936-37 declined to 10,000 bales from 13,504 in 1935-36, according to official statistics. It is said that the decline in production was brought about by a smaller acreage, owing to the fact that increased wheat prices caused some growers to plant wheat on their land devoted to cotton. The decline in production made it necessary for Australia to increase imports from about 7,850 bales in 1935-36 to 10,750 bales in 1936-37, which was brought in duty-free under permits issued by the Government.

(U.S. Dept. of Commerce)

BRAZIL.

The following crop report dated January 7, 1938, has been received from Mr. R. E. Brennan, Rua Sao Bento 290, Sao Paulo :—

(A) SAO PAULO

Sao Paulo cotton crop conditions continue to improve ; days and nights are much warmer than during December, and although rains have continued to be general, they have, for the most part, been light, beneficial showers of short duration. Reports from the interior reflect that there are, as yet, very few infestations of the cotton plant by insects, and as the farmer is now accustomed to the use of arsenate of lead for poisoning against the leaf worm and other cotton pests, and there is a good stock of this poison in the country ; there is no cause, at present, for worry on this account.

With the continued better than normal crop condition, it is still the general opinion that the crop will be larger than last year, naturally presuming that the weather conditions continue favourable. Needless to say, should we have the same excess of heavy rains from January to May that we had during the same months in 1937, production may be lower than my estimate, and grades may also suffer, but the position of the crop is so good, as compared to this same time in 1937, that there would have to be a great change in conditions to cause a smaller crop. There have been several estimates higher than the writer's of 225,000,000 kilos, but I do not feel that without a top crop, that figure will be greatly exceeded.

It is interesting to note that, although the Government has, this season, distributed less cotton seed to the farmers than they distributed for the previous crop, approximately the same acreage has been planted as last season. There has been some replanting, but not nearly as much as in previous seasons, and the farmer has also learned, from both experience and instruction, the amount of seed he must plant per alqueire (approximately six acres) in order to receive the maximum amount of seed cotton

possible. As all seed planted is distributed by the Brazilian Government, which makes extensive studies to arrive at the best seed applicable to each type of land, and also fumigates the seed before distributing, the farmer is, each year, in a better position as regards both production and cost of same. It is on these points, as well as on reports received from the interior as to present status of the crop, that our estimate, showing an increase in production for this season, has been based.

The following are approximate figures, to date, on the 1936-1937 crop, taking into consideration carryover from previous seasons ;

Classed	203,000,000 kilos.
Exported	160,000,000 kilos.
Local Consumption	42,000,000 kilos.
Sao Paulo stocks	13,000,000 kilos.

The Sao Paulo stock figures shown represent, for the most part, the lower grades, according to information received from reliable sources.

(B) NORTH BRAZIL

The North Brazil crop figure is generally conceded to be between 180,000 and 200,000 tons, my estimate continuing to be around 190,000,000 kilos. The crop is well advanced, and receipts at and shipments from North Brazil ports are steadily mounting. We are informed that the grades continue to be good, but that they are somewhat lower than during the first half of December, which is, of course, only natural. However, it appears that quantities of Brazilian Government box type Four, as well as some type Three, are still appearing on the market. When full reports are received, we believe that production, as well as average grade, will be somewhat higher than it was for the season 1936-1937.

January 15, 1938

It is possible that I shall have to revise my estimate of North Brazil production of 190,000,000 kilos of lint cotton, as the final figure may be between 175,000,000 and 185,000,000 kilos of lint cotton. From reports received from the North, the increase of acreage in Sertao was five to ten per cent., and in Matta cotton about twenty-five per cent., but on account of rains last May/July, and the consequent delay in picking, the crop was about a month late, and the quantity may be somewhat lower than expected. However, until we receive more complete information from the North, justifying a revision in estimate of production, I think we should continue to consider the crop as being around 190,000,000 kilos, as we understand that, in those North Brazil States where the picking is completely over, there still remains some seed cotton and lint cotton in the interior.

We are informed that picking in the larger cotton producing States north of Pernambuco (Ceará, Rio Grande do Norte and Parahyba) is practically 100 per cent. over, while in Pernambuco and States south (Alagoas and Sergipe), where picking is always later, only 35 per cent. to 40 per cent. of the crop has been picked.

It will be another thirty to sixty days before we can get nearly final figures, but we are quite sure that that production will be larger than last season.

As quite a bit of perennial cotton was planted last season, and did not bear cotton this first year, this fact will influence any estimate of the crop.

On account of the large area covered by the North Brazil cotton producing states, it has, up to now, been a problem to receive accurate figures early enough to have importance, but we hope to be in a position to receive before the 1937-1938 crop commences, quicker and more accurate information as regards North Brazil cotton.

The grades continue to be high, it being estimated that average grade will be on the high side between Government box types Four and Five.

According to the local press of the 18th November, 1937, the following conclusions were reached in regard to the cotton trade at a meeting of the Federal Council for Foreign Trade held on the 17th November, 1937 :

(a) The future of Brazilian cotton exportation depends on whether the cotton can be produced economically ; it should also be of guaranteed quality.

(b) It is strongly recommended that the Ministry of Agriculture instigate a rigorous inquiry in all cotton producing zones in order to obtain detailed information regarding producing costs.

(c) To capture international markets, Brazilian cotton bales and lots should be made up with a view to uniformity of quality and size. The Ministry of Agriculture should, therefore, also cause careful inquiry to be made in regard to the methods adopted throughout the country in cleaning cotton, with the object of installing modern preparation mills ; a strict supervision of the classification of the product should, at the same time, be instituted.

(d) The installation of mills should be financed by agricultural credits, and facilitated by the formation of agricultural associations and co-operative societies of growers.

(e) As an inducement to the improvement of Brazilian cotton, exemption of taxation should be granted in respect of types classified between 1 and 3.

(f) The promulgation of the draft law for the obligatory classification and standardisation of agricultural, animal and dairy produce sponsored by the Council, is an urgent necessity.

(g) In order to avoid a fall in exports of Brazilian cotton and to assist in combating competition in foreign markets, the Agricultural and Industrial Department of the Bank of Brazil should begin operating without delay.

BULGARIA.

The wet weather of the first half of October had an unfavourable effect on the cotton crops by delaying picking and the opening of bolls and damaging, though slightly, the bolls already opened. However, the rather dry and fine weather of the second half of the month appreciably improved the outlook and the crop was expected to be plentiful.

(International Institute of Agriculture)

CHINA.

The Chinese Cotton Statistics Association estimates the Chinese cotton acreage for 1937-1938 at 11,243,000 acres. The production is estimated at 3,083,000 bales compared with 3,741,493 bales in 1936-37.

The decrease is partially due to excessive rains and floods in the Shangtung and Hopei provinces, also neglect to the crop due to political unsettlement.

According to later news, excessive rains have damaged about 40% of the crop in the Hopei province and remainder is of the poorest quality. With the lack of demand growers uprooted the crop.

CHOSSEN.

The first estimate of the 1937 cotton crop in Chosen is placed at 216,000 bales of 478 pounds, according to a report received. The acreage this year is estimated at 545,000 acres, which is only 3 per cent. below the 1936 record. The estimated production of 216,000 bales greatly exceeds that of last season, which was only 119,000 bales. The large increase this season is attributed to the very favourable weather conditions and the marked increase in production of Upland or improved cotton. The acreage of native cotton has decreased, while that of Upland varieties has shown a steady increase during the past 5 years.

It has been reported that the Chosen Government authorities will endeavour to increase the area devoted to cotton to about 1,000,000 acres by 1942, from which it is hoped to obtain approximately 600,000 bales.

CHOSSEN :

Season	COTTON ACREAGE, PRODUCTION AND YIELD PER ACRE, 1933-1937							
	Acreage		Production*		Yield per acre			
	Native	Upland	Total	Native	Upland	Total	Native	Upland
	1,000	1,000	1,000	1,000	1,000	1,000		
	acres	acres	acres	bales	bales	bales	Pounds	Pounds
1933 ..	145	287	432	35	105	140	115	175
1934 ..	147	327	474	26	110	136	85	161
1935 ..	152	362	514	34	155	189	107	205
1936 ..	158	402	560	37	82	119	112	98
1937†	118	427	545	30	186	216	122	208

Compiled from Chosen official estimates.

* Bales of 478 pounds.

† Preliminary.

(U.S. Dept. of Agriculture)

GREECE.

The condition of unirrigated cotton crops, which previously had been rather poor owing to the drought of the summer, improved appreciably with the assistance of the rains of September and October. The crops in irrigated regions were in better condition. Ripening was hastened by the warmer and drier weather of October. Owing to the higher yield per acre and the increase in sowings over last year, a very plentiful crop is expected this year.

According to the latest report of the Cotton Institute, cotton production which was previously forecast as very large is now reported as much smaller and may even be less than last year. This is due mainly to various diseases, which attacked plants after the heavy rains of October and November.

(International Institute of Agriculture)

HAITI.

Total ginned cotton exports in the fiscal year October 1, 1936, to September 30, 1937, were 118,865 centals (24,867 bales) against 126,860 (26,540) last year, a decrease of 6 per cent.

(International Institute of Agriculture)

ITALY.

On October 15 cotton production was reported to vary from one district to another: the Sicilian harvest was on the whole estimated as satisfactory.

(International Institute of Agriculture)

MANCHUKUO.

Mukden cables stated that the Manchurian crop is estimated at 84,205 bales of 478 lb. equivalent weight, comparing with 65,900 last year and 38,740 two years ago. The record crop in Manchuria was 86,471 raised in 1934.

(New York Cotton Exchange Service)

MEXICO.

Cotton crop of 1937 is estimated at about 310,000 bales by the Mexican Department of Agriculture. If this estimate materialises, it indicates a probable export surplus of about 75,000 bales. However, it is the opinion of some trade authorities that the estimate of the crop may be too liberal. It is said that Mexican cotton mills are somewhat uncertain as to the available supply and the prices at which they will be able to obtain the cotton. It is understood that the Government intends to peg the cotton price at a considerably higher level than that prevailing in the United States, and some manufacturers feel that the high cotton prices may limit the demand for goods.

(Textile Raw Materials)

NETHERLANDS INDIES.

With regard to cotton exports for the 12 months ended July 13, 1937, shipments of unginned cotton amounted to 3,972 metric tons, compared with 1,915 tons for 1935-36, while those of ginned cotton amounted to 1,282 tons, compared with 827 in 1935-36, according to official statistics. Total shipments of seed cotton and lint cotton amounted to about 11,400 equivalent bales of 500 pounds, compared with 6,460 bales in 1935-36.

Japan continued to take practically all the seed cotton but lost its position as chief purchaser of ginned cotton to the United States. Shipments of ginned cotton to Japan in 1936-37 amounted to 299 tons, against 502 in 1935-36, while those to the United States were 801 and 163 tons, respectively.

The area planted to cotton in Java is estimated at about 43,000 acres for the 1936-37 crop, against 31,000 in the preceding year, and it is estimated that approximately the same area is planted in the Outer Provinces.

In 1936 cotton picking took place mainly during October and early November.

(U.S. Dept. of Commerce)

NIGERIA.

In September it was expected that, if weather conditions remained favourable to cotton growing during October, the crop would be at least equal to that of last season.

(International Institute of Agriculture)

PARAGUAY.

The Government have announced that they intend to abolish the exchange appropriation in respect of cotton, and this will naturally be of great assistance to the whole industry. The sale of seeds, which had hitherto been a Government monopoly, is now to be free. Under a Decree dated 9th March last, the whole of the 1937 production of cotton-seed was to be purchased by the *Banco Agricola* at the fixed price of 2,500 Paraguayan pesos per metric ton, and the Government re-sold, with a health certificate, at 4,000 pesos. The two concessions now announced will result in an increase of approximately 4 to 5 Paraguayan pesos per kilo in the price received by planters for their fibre.

(Bank of London and South America)

Acreage planted to cotton in Paraguay for the 1937-38 crop is estimated to be 10% larger than the acreage planted to the 1936-37 crop, according to advices received from Asuncion. Cotton is planted in Paraguay from August to November and harvested from January to July. The 1936-37 cotton crop of Paraguay was approximately 57,652 equivalent 478 lb. bales, and the 1935-36 crop was approximately 46,231 bales.

(New York Cotton Exchange Service)

ST. VINCENT.

The close season terminated on August 15, 1937, and planting operations immediately began in spite of very unfavourable weather conditions. The dry season was unusually prolonged and the total rainfall for August and September was rather less than 65 per cent. of the average. By the end of September, 45,757 lb. of seed had been sold by the Government Cotton Ginnery, as compared with a total of 37,949 lb. in 1936; percentage: 120.9. Germination on the whole was quite fair, but subsequent growth suffered. This was especially marked in the Seward districts where much supplying, and even replanting, in extreme cases, was necessary, but surprisingly good stands were obtained on the Windward side. By the end of September growth was generally fairly satisfactory. It was reported that there had been a marked reduction in the incidence of angular leaf spot disease as compared with early growth in 1936, and that the plants presented a very clean, healthy appearance. This may, perhaps, be attributed to the mercuric chloride treatment of the seed, which was omitted in 1936. As a result of the severe weather conditions most growers have been unable to plant as large an area as they had hoped, and in consequence the total acreage shows a reduction as compared with that of last year.

(International Institute of Agriculture)

SUDAN

The Sudan Government, Agriculture and Forests Department, Khartoum, Cotton Progress Report for November, 1937, runs as follows. Season 1937-38 (in bales of approximately 400 lbs. Lint).

		Estimated Total Yield.		Picked to Date.		Area under Crop, Feddans		
		1937-38	1936-37	1937-8	1936-7	1937-38	1936-37	
		Nov.	Oct.	June	Nov.	Nov.	Nov.	June
Sakellaridis Irrigated :—								
Gezira {	S.P.S. Ltd. . .	<i>a</i> —	<i>a</i> —	186,642	—	—	167,982	167,288
	K.C.C. . .	<i>a</i> —	<i>a</i> —	36,085	—	—	38,671	31,837
Tokar . .	. .	10,000	<i>b</i> —	29,807	—	—	20,000	43,000
Kassala . .	. .	16,250	<i>c</i> —	17,090	—	—	34,422	30,335
Dueim (Government Estates) . .	. .	500	<i>c</i> —	524	—	—	500	500
Gondal (Government Estates) . .	. .	400	<i>b</i> —	663	—	—	390	450
Abdel Magid (Govern- ment Estates) . .	. .	1,625	<i>c</i> —	—	—	—	1,720	—
Private Estates . .	. .	10,550	<i>d</i> —	10,028	99	—	11,543	11,029
Total Sakel. Irrigated		—	—	280,838	99	—	275,228	284,439
American Irrigated :—								
Northern Province :—								
Berber (Government Pumping Schemes) . .	. .	3,063	3,086	2,830	3,052	2,781	2,420	2,484
Dongola (Government Pumping Schemes) . .	. .	2,025	2,025	2,263	94	—	2,177	2,264
Zeidab (Private Estates) <i>e</i>	. .	5,243	5,000	5,321	5,243	5,282	5,159	5,269
Other Private Estates . .	. .	1,872	1,500	989	1,373	891	2,096	1,625
Total Am. Irrigated		12,203	11,611	11,403	9,762	8,954	11,852	11,642
American Rain Grown :—								
Kordofan . .	. .	26,975	28,500	24,556	3,370	1,380	123,000	125,000
Upper Nile . .	. .	1,175	1,750	1,250	—	—	7,500	8,500
Equatorial . .	. .	3,750	3,750	5,268	—	—	18,698	27,800
Total Am. Rain Grown		31,900	34,000	31,074	3,370	1,380	149,198	161,300
Total All Varieties . .		—	—	323,315	13,231	—	436,278	457,381

a Probably above average. *b* Fair. *c* Good. *d* Average. *e* Final.

TANGANYIKA.

In September weather conditions generally were hot and dry throughout the territory. A partial failure of the Mwanza cotton crop was reported, and it was expected that the final figures would probably be 33 per cent. below original estimates.

(*International Institute of Agriculture*)

ASIA MINOR.

According to H.M. Consular Reports, the area given over to the cultivation of cotton in the Aegean Zone was again extensively increased this year, and during the planting season there appeared to be every prospect of a record yield, which was hoped at the time would touch the 100,000 bale mark.

The Cotton Research Institute at Nazilli had been carrying on experiments, under Government auspices, in order to produce a choice variety of seed. As an outcome of this research work, a few hundred bales of cotton with a staple of 33 millimetres was marketed last year. This compared very favourably with the local product, the staple of which does not exceed 25 millimetres. The new quality has been given the name of "Akala" and is grown from seed originally imported from America. Every effort has been made to extend the cultivation of this improved quality, with the result that the yield of "Akala" cotton this season is estimated at no less than 20,000 bales. This represents approximately one-third of the crop against a mere handful of bales that were marketed last season.

UGANDA.

The acreage planted to the end of September was estimated to be 1,676,000 as compared with 1,412,000 acres planted to the same date last year. Percentage: 118.7. The above figure is subject to revision when the 1937 mean plot size for all district has been ascertained, but there is no doubt that the acreage under cotton in Uganda is larger than it was last year. The condition of the crop, although not good in some areas was, on the whole, reasonably satisfactory.

(International Institute of Agriculture)

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U.S.S.R.

By November 20, the plan for cotton picking throughout the U.S.S.R. was fulfilled to 85.2 per cent., and the quantity gathered exceeded that of last year for the same period by 105,000 tons. It is therefore clear that the total cotton harvest will show a considerable increase over last year's yield.

Some interesting results have been achieved in the cotton yield per acre; the figures exceed those of last year by amounts varying from an average increase of 84 kg. obtained in the yield for the Tajik Republic, to 320 kg. in the Kangurt and Ura-Tyube districts. The harvest in Turkmenistan and Uzbekistan is as good as that of Tajikstan, but cotton picking has not been so well organised as in Tajikstan, which has already fulfilled its plan for the year by 105.6 per cent.

In the non-irrigated areas of the Ukraine the cotton plan has been overfulfilled by 1.3 per cent. As a result of the excellent organisation of cotton picking, the Odessa and Nikolayev provinces exceeded their plans by 16.8 per cent. (*Monthly Review of U.S.S.R. Trade Delegation in the United Kingdom*)

An interesting development in cotton cultivation is the great change that has taken place in the location of cotton areas in recent years. Before the Revolution, cotton was grown exclusively in the irrigated areas of Central Asia and Transcaucasia. During the five-year Plans new cotton plantations have been laid out in non-irrigated regions of the country—in the Ukraine, the Crimea, Stalingrad Province, Orjonikidze and Krasnodar territories, over an area exceeding one million acres, and the product grown is of exceptionally fine quality. Many of the new cotton-growing areas fulfilled the planned yield for 1937.

(*Monthly Review of the U.S.S.R. Trade Delegation in the U.K.*)

YUGOSLAVIA.

Cotton growing was attempted for the first time in the Banat, giving very satisfactory and quite unexpected results.

(*International Institute of Agriculture*)

COTTON GROWING IN AUSTRALIA

The following is extracted from a recent issue of the *Textile Journal of Australia*.

The production of cotton in Australia is confined to Queensland, where this branch of the primary industries has had a chequered career from away back to 1860. In that year an area of fourteen acres was planted with cotton. Ten years later the area had increased to fourteen thousand acres. Then came a severe setback.

Even during the last fifteen years the cotton-growing industry in Queensland has passed through some very unfavourable times, both in regard to the agricultural problems met within its culture under Queens-

land conditions, and also in regard to the profitable marketing of the product grown.

During recent years, however, with the development of the cotton textile industry in Australia as a result of tariff duties placed on the importation of certain cotton yarns and cotton goods, the market for Queensland-grown cotton has been placed on a very stable basis. The whole of the cotton now grown in Queensland is sold to Australian spinners at an Australian price level—that is on the basis of the import parity price of similar quality American-grown cotton.

From an agricultural point of view very considerable progress has been made in the cotton growing industry, particularly in regard to all cultural operations, and it has now become generally accepted that to grow cotton successfully under our Queensland conditions the rotation of crops must be practised.

After extensive research work carried out by the Cotton Section of the Department of Agriculture and Stock, it has been definitely proved that where cotton is grown in rotation with grass lands or other fodder crops, the cost of producing cotton is reduced and higher yields of better quality cotton can be produced. This form of rotation fits in admirably with the dairying industry, which in Queensland is very firmly established, and is one of the most important primary industries in the cotton-growing districts of Queensland.

Cotton growing and dairying also form an ideal combination, owing to the fact that one of the principal by-products manufactured from the processing of the cotton seed is cottonseed meal. Cottonseed meal is a high protein concentrated stock food, and has proved itself in Queensland—as in every other stock country in the world—to be an ideal concentrate for increased milk production, and also in maintaining the health of the dairy stock.

Considerable progress has also been made in improving the agricultural methods of growing cotton, particularly in regard to the introduction and acclimatising of suitable varieties of cotton. This selection, breeding and acclimatising of suitable cotton varieties has served two purposes.

In the first place, it has been necessary for the cotton-growing industry in Queensland to produce the type of raw cotton required by the Australian cotton textile industry. The cotton-manufacturing industry in Australia requires a short to medium staple cotton only, and this has been met by the Queensland Cotton Board by concentrating on the production of a hard-bodied fibre having a staple length ranging from 15/16-in. to 1-1/16-in.

In the second place, the introduction of these new varieties is a distinct advantage from an agricultural point of view, because these short to medium varieties of cotton have proved to be more suitable to the conditions experienced in the Queensland cotton belt. These varieties are hardy types of plants, are quicker maturing, have a higher lint percentage of the seed cotton, and are more fitted in every way to produce better yields than the old long-staple types of cotton previously grown in Queensland.

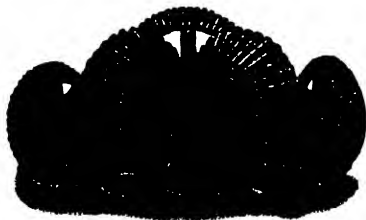
The present cotton season in Queensland, i.e., 1936-37, has been a most unfavourable one owing to the adverse climatic conditions. In Queensland cotton is planted during October and November, and harvesting commences during March and continues on until the end of August.

For the season just past the spring rains for planting did not eventuate, and this resulted in practically all the crop being late planted. Dry, hot conditions were experienced during the summer period, and the result was most disastrous in regard to the yield of cotton harvested from the crops, and it is anticipated that only 9,000 bales of raw cotton lint will be produced for the 1936-37 cotton season, which is only half the crop that could have reasonably been expected under normal weather conditions.

COTTON GROWING IN ETHIOPIA

The question of the supply of raw materials for the Italian textile industries from Italian colonies seems to have made further progress towards its settlement through the creation of the Compagnia del Cotone d'Etiopia presided over by Honourable Gino Olivetti, and of the Ente del Cotone Africa Orientale, at the head of which has been called Prince Concompagni. The Ente del Cotone is to have a capital of 25 million lire,

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50 per cent. of which is to be subscribed by the Istituto Cotoniero Italiano, which is also presided over by Honourable Olivetti. Italian East Africa is to have its cotton districts. Four of them have already been established at Tessenei, on the river Auasc, at Metemma, and at Cobbo, while a fifth one might be established on the Giuba. The Compagnia del Cotone has already started the cotton plantations in three districts. According to the project of the company, everything connected with a rational cotton output in the various districts is to be built, starting from warehouses, ginning and baling plants, to subsidiary plants such as oil mills to obtain cotton oil, soap factories, etc. The company is to be in charge of the propaganda for cotton growing among natives, and of the supervision of plantations, etc. The growers, who are to obtain concessions for plantations in the districts where the Compagnia del Cotone is developing its activity, will be compelled to sell the whole of their cotton output to the company itself in order to avoid dangerous fluctuations of prices. The Compagnia per il Cotone d'Etiopia has just increased its capital to 14 million lire in order to meet the requirements of the first operations to start plantations.

(Textile Recorder)

REPORT ON THE CULTIVATION OF COTTON IN GREECE

The following article has been received from the Hellenic Cotton Institute, Athens.

From the beginning of this century up to 1931, cotton cultivation has been limited to the reclaimed lands of Lake Copais and to drained marshes in Laconia and the Serres district.

CLIMATE.

Owing to the country's temperate climate the cultivation of cotton in the plains is possible. The mean temperature during the growing season favours the normal development of the plant and the maturing of the bolls.

SOIL.

There is a great variety of soils. Cultivation is mainly divided between two groups :—

- (a) Black soil, and
- (b) Sandy clay alluvial soil.

Both belong to the category of fertile rich lands. About one-third of the present cultivated area of 82,000 hectares is under irrigation, the remainder is unirrigated, but preference is given to lands retaining the necessary subsoil moisture.

New irrigation and drainage works have been undertaken in Thessaly and Macedonia which will largely increase the area of land under irrigation, a part of which will be available for cotton.

ECONOMICS.

Under present-day agricultural economic conditions the cultivation of cotton in Greece is more advantageous than that of any other field crop with the exception of tobacco. However, the cultivation of the latter, owing to the difficulty in opening new export outlets at paying prices, does not afford a margin for further extension.

ORGANISATION OF COTTON PRODUCTION, TRADE AND INDUSTRY IN GREECE FROM 1931 ONWARDS.

Before 1931 the cultivation of cotton was on quite a small scale, 15 to 20 thousand hectares, and primitive in its methods.

A great number of varieties imported at different times from various countries were cultivated. In the majority they were of American origin, but a substantial part was the *gossypium herbaceum*.

The farming methods were primitive and the plants received little proper care. No attempt whatsoever was made to control insects. Harvesting was done in a perfunctory careless way to the great detriment of the crop grade. Ginning was undertaken by sundry factory owners such as millers, etc., without experience of the conditions conducive to efficient ginning, who utilised obsolete machinery. The trade in cotton was entirely unorganised and in the hands of small dealers.

On broad lines the situation before 1931 may be summarised as follows :—

- (a) Small production.
- (b) Poor yields.
- (c) Low grade.

To remedy matters the Government established in 1931 the Cotton Institute, to which they entrusted the scientific study of all problems connected with cotton production, namely :—

- (a) The extension of the cultivated area.
- (b) The selection and propagation of improved varieties suited to the country's agricultural and climatic conditions.
- (c) The increase of yield per acre and of lint outturn.
- (d) The study and control of cotton pests.
- (e) The improvement of the ginning and baling conditions of cotton.
- (f) The organisation of the cotton trade.
- (g) The study of the local textile industry and its improvement.

The Institute, in the year following its establishment, engaged and formed its own staff of agriculturalists which were posted not only in those districts where cotton was already cultivated but also in those where its propagation was to be initiated. It supervised details regarding cultivation, established four permanent experimental stations, arranged for financial assistance to be given to cotton farmers by the Agricultural Bank, put in hand the manufacture of a sufficient number of cotton seed sterilisers and fumigators—the latter using carbonate bisulphate—for the control of the pink boll-worm.

The Institute also imported from America large quantities of cotton seed for planting purposes which were distributed below cost to the farmers, and took special care to prevent mixing by favouring the propaga-

tion of one variety communities. A special laboratory has been equipped for the grading of cotton by a staff of expert classers.

Further, the Institute organised a statistical service, encouraged in various ways the establishment of up-to-date ginneries, took measures to help the organisation of the cotton trade on a proper basis and towards the development of the local textile industry.

In the first six years the efforts of the Institute have achieved a fair measure of success, as may be seen from the tabulated statistics given below :—

Year		Area in hectares	Average Yield of lint in kilos per hectare	Crop of Seed-Cotton in kilos
1931	..	18,482	144.2	9,889,700
1932	..	20,253	228.0	15,887,900
1933	..	38,205	250.6	30,884,300
1934	..	44,641	252.0	36,300,300
1935	..	53,755	273.5	47,418,400
1936	..	72,275	218.0	50,852,400
1937	..	82,156	260.0*	63,146,000*

* Last estimate.

Nowadays the cultivation is carried on with all due care. The measures to control pests, mainly the pink boll-worm, are extensively applied, the use of fertilisers, particularly in irrigated fields, is on the increase. Greater care is taken when harvesting to keep the cotton free from trash.

As to quality the bulk of the crop turns out as follows :—

Grade : Strict low middling to Strict good middling.

Staple : Length varies from 23 to 32 millimetres, but mainly between 25-26 millimetres.

The lint outturn varies between 28 and 38 per cent., with an average of 32 to 33 per cent.

Many new fully equipped ginneries have been erected or are in course of erection. Special legislation penalises malpractices, such as false packing, etc. The eventual export of the surplus cotton, starting from this year, will be under the supervision of the Institute as regards the even running quality of the bales.

Of the new varieties introduced, those more in request are :—

1. Acala, which is now sown in 28 per cent. of the total area.
2. Ingold, which accounts for 7 per cent. of the total.

The demand for both these varieties, as well as that for a few others recently imported, tends to increase further.

Experiments have also been carried out with Egyptian seed, but the Institute does not feel, at this stage, justified in encouraging its propagation because of its late maturing.

Sowing time starts in the first days of April and goes on until the first fortnight in May, subject, of course, to local and weather conditions. Harvesting—by hand picking—begins in September and is carried right through to the end of November ; the bulk of the crop being harvested in October.

COTTON GROWING IN BELGIAN CONGO

Production of lint cotton in 1936 totalled 30,600 metric tons compared with 25,828 in 1935 and 19,720 in 1934. These figures include 670 tons for 1936 and 643 in 1935 produced in the Mandated territory of Ruanda-Urundi. The estimated production for 1937 is about 100,000 tons of seed cotton (equivalent to approximately 33,000 tons of lint cotton), of which 58,000 tons are estimated to have been produced in the northern zone and 42,000 tons in the southern zone. Cotton in the northern zone is planted in June and July and picked from December to April, while in the southern zone cotton is planted in December and January and picked in June and July. The area planted in 1936 is estimated at 302,000 hectares of 2.47 acres each.

There are 9 ginning companies operating 119 ginneries in the Colonies and the total investment in this industry is said to amount to about 150,000,000 francs.

(Textile Raw Materials)

WORLD PRODUCTION OF COMMERCIAL COTTON

(American Running Bales, Foreign Equivalent 478 lb. Bales.)

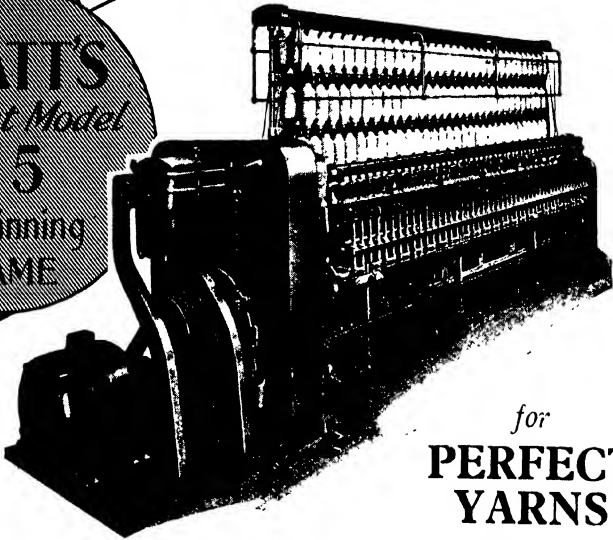
United States—	1934-35	1935-36	1936-37	1937-38 ^p
Actual Ginned Crop	9,472,000	10,420,000	12,141,000	18,091,000
Adjustment to Prod. in Season (a)	104,000	75,000	234,000	209,000
Total Production in Season . .	9,576,000	10,495,000	12,375,000	18,300,000
Brazil	1,298,000	1,678,000	1,708,000	2,100,000
China	2,350,000	2,063,000	3,256,000	3,250,000
Egypt	1,523,000	1,758,000	1,863,000	2,250,000
India	4,198,000	5,323,000	5,661,000	5,500,000
Russia	1,738,000	2,250,000	3,250,000	3,250,000
Other Countries	2,367,000	2,753,000	2,587,000	3,200,000
Total Foreign Countries . .	13,474,000	15,825,000	18,325,000	19,550,000
Total World	23,050,000	26,320,000	30,700,000	37,850,000

(a) City crop accumulations plus Mexican cotton imports into the United States. Mexican imports into the United States deducted from foreign production.
p=Preliminary.

(New York Cotton Exchange Service)

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GOVERNMENT'S DECEMBER CROP REPORT

The preliminary final estimate of this year's American cotton crop, issued on December 8 by the Washington Department of Agriculture, indicates a production of 18,746,000 bales, exclusive of linters. This is 504,000 bales larger than the estimate issued in November and compares with 12,399,000 bales and 10,638,000 bales harvested in the two previous seasons. The total crop is exclusive of 52,000 bales grown in Lower California, where 61,000 bales were harvested last year. The average yield per acre is now estimated at 264.6 lb., against 197.9 lb. for the previous crop and 186.3 lb. for the 1935 crop. The harvested acreage is estimated at 33,930,000, which compares with 30,028,000 acres last year and 27,335,000 acres in 1935, the average abandonment this year being estimated at 1.3 per cent., against 2.8 per cent. last year and 1.9 per cent. in 1935. The Bureau says that the estimated production on December 1, which is the largest on record, was increased in all major States except Louisiana, Oklahoma and Arkansas.

The following table gives details, with comparisons (in thousands) : —

	1937 Harvested acres	1937 Yield bales	*1936 Harvested acres	*1936 Yield bales
Virginia	64	41	53	33
North Carolina	1,101	775	957	597
South Carolina	1,679	1,025	1,399	816
Georgia	2,640	1,490	2,276	1,086
Florida	115	40	88	31
Missouri	521	370	410	308
Tennessee	970	640	829	433
Alabama	2,623	1,610	2,321	1,145
Mississippi	3,418	2,625	2,998	1,911
Louisiana	1,555	1,080	1,401	761
Texas	12,664	5,230	11,597	2,933
Oklahoma	2,454	825	2,251	290
Arkansas	3,059	1,830	2,731	1,295
New Mexico	142	157	116	111
Arizona	281	280	208	191
California	614	710	368	442
Other States	30	18	25	16
Total	33,930	18,746	30,028	12,399

* The 1936 figures are those revised in May, 1937.

JANUARY GINNING REPORT

The report issued on January 24 by the Census Bureau showed that up to the close of business on January 15 a total of 17,646,000 bales of the 1937 American cotton crop had been ginned. This compares with 11,956,000 bales last year and 10,248,000 bales two years ago. The amount ginned since the previous report, which was made up to December 13, is 834,000 bales, against 257,000 bales in the corresponding period last season and 493,000 bales in the season before. Included in the total are 316,000 round bales. 4,000 bales Sea Island, and 10,000 bales American-Egyptian, against 281,000 round bales and 15,000 bales American-Egyptian shown in the corresponding report last year.

The following table gives details of ginnings with comparisons :—

	1938	1937	1936
Alabama	1,561,000	1,132,894	1,028,261
Arizona	266,000	172,015	124,993
Arkansas	1,730,000	1,260,708	830,375
California	656,000	402,551	213,561
Florida	35,000	27,631	26,503
Georgia	1,466,000	1,073,999	1,041,245
Louisiana	1,039,000	741,588	540,648
Mississippi	2,419,000	1,854,134	1,222,324
Missouri	360,000	209,082	179,895
New Mexico	146,000	104,039	67,104
North Carolina	768,000	562,009	568,658
Oklahoma	736,000	288,011	541,569
South Carolina	986,000	767,190	726,767
Tennessee	600,000	420,848	312,229
Texas	4,823,000	2,808,365	2,790,569
Virginia	38,000	28,986	26,290
Other States	17,000	12,331	7,200
Total	17,646,000	11,956,381	10,248,191

A.A.A. CONSIDERS CUT IN NEW COTTON CROP TO 10,500,000 BALES

According to the *New York Journal of Commerce*, plans for a 1938 cotton programme calling for planting of about 25,000,000 acres, or production of around 10,500,000 bales, are under consideration by the Agricultural Adjustment Administration.

The programme, which would come close to the maximum reduction in production provided for in House and Senate drafts of the new farm programme, will probably be put into effect under the existing soil conservation law in event the new agricultural legislation is not ready when the first planting of this year's crop begins in Texas during the latter part of February.

In announcing the soil conservation programme for this year, A.A.A. provided a cotton acreage goal of between 27,000,000 to 29,000,000 acres. Indications of a carryover of 11,000,000 bales at the beginning

of the 1938 harvest season, expected to result from lowered mill activity and export demand and the all-time record crop of 18,746,000 bales in 1937, has led A.A.A. officials to call for further reductions.

Reduction in production to 10,090,000 bales, or a decrease in acreage to 25,000,000 acres, is possible.

The Senate draft of the legislation provides for limitation of production on the basis of baleage, and holds that the reduction shall not be more than 70 per cent. of average production during the ten-year period ended in 1932. Average production during that period, A.A.A. officials explained, was around 14,400,000 bales. This would mean that the Senate draft would allow a production reduction to about 10,090,000 bales.

The House draft provides for limiting production on an acreage basis and holds that the maximum reduction shall not exceed 60 per cent. of the average acreage planted during the ten-year period ended in 1932. Average acreage for the period, according to the same officials, was 41,500,000 acres, which would mean a maximum possible acreage reduction under the terms of the Bill to 24,900,000 acres.

It was further pointed out by A.A.A. officials that on the basis of average production the two drafts of the legislation mean about the same thing in baleage.

So far the Administration has made no move to make a reduction in the announced 1938 cotton programme because it did not want to act before Congress had decided upon the new legislation, it was explained. Officials said that they are ready to act, however, if it looks like the new farm programme will not be ready in time to meet this year's plantings.

Under the 1937 cotton loan and subsidy programme, farmers who received a loan from the Commodity Credit Corporation are bound to comply with the 1938 acreage reduction programme announced by the A.A.A. The 1938 programme must be complied with before producers receive the 3c. per pound subsidy provided in the programme.

MOISTURE IN AMERICAN COTTON

Mr. Fred Taylor, principal marketing specialist to the U.S. Dept. of Agriculture, who is again in Europe, has made a special study of spinners' complaints relating to the excessive amount of moisture contained in this season's shipments of new crop American cotton, and has forwarded a report to his Department in Washington.

Mr. Taylor has received a reply to his report, and extracts from this reply are quoted below :—

"On account of the exceptionally unfavourable conditions under which a part of the 1937 crop was harvested and ginned, there has necessarily been more than the normal amount of ginning of relatively damp cotton, with resulting roughness in preparation. It should be said, however, that early in the fall a great deal of publicity to discourage the ginning of damp cotton was given by state extension workers, etc. . . .

Oil mills in the mid-south declared an embargo of two weeks on cotton-seed because wet seed could not be handled and dried fast enough to prevent heating and deterioration, and this action also discouraged to some extent the ginning of damp seed cotton.

"You will be interested to know that during the season there has been a very substantial increase in the number of cotton driers, particularly in the states of Mississippi, Arkansas, and Louisiana, and that according to the best available information, seed cotton going into approximately one million bales of the 1937 crop was handled through these driers.

"While this particular complaint reached us late in the season, it is believed that it may be helpful in dealing with any similar complaints to point out that our ginning research people and others throughout the South have been very active in their efforts to minimise the damage due to ginning damp cotton."

In two issues of a well-known Texas cotton journal published during the autumn of last year, various photographs were published similar to the one reproduced herewith, purporting to bear witness to the bounty of Mother Nature in providing such phenomenal yields of cotton during the current season.

With all due respect to our Southern friends, and whilst congratulating them upon their bumper crop (with our eyes carefully turned away from the price quotation board), we are beginning to see in these photographs irrefutable evidence of the cause of serious complaints which European spinners are making this season, concerning damp in American cotton. Cotton containing as much as 14% of moisture has, to our knowledge, been delivered to English spinners this season, and to judge from the photographs we have seen of seed cotton lying around in heaps waiting to be ginned, the cause of these complaints is not far to seek.

Whilst making all allowances for an extraordinarily busy season due to a record crop, the remedy would appear to be in the hands of the ginners themselves in providing adequate storage accommodation for cotton awaiting to be ginned.



A scene outside a Texas Gin during the current cotton season.

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DRYING OUT WET COTTON AT THE GINS

According to Dr. C. T. Dowell, director of the Louisiana Experiment Station, this year's cotton ginning season has demonstrated the value of cotton dryers in gins to dry out wet seed cotton and thereby greatly increase the returns to the growers.

During the early part of the cotton picking season there was an unusually heavy rainfall, with the result that a great deal of seed cotton went to the gins in a very wet condition. This cotton could not have been ginned properly and given a good product without the use of the dryers that have increased in the state in the last two or three years.

During this past year, cotton containing as much as 24 per cent. water had been dried at the Stoneville Laboratory, and temperatures as high as 220 degrees with an unusual volume of hot air to dry this very wet cotton were used. No injury was caused to the fibre by drying the cotton this way and, in drying cotton by this high temperature and the large volume of air, the workers did not find it necessary to slow down the rate of ginning when a loose seed roll was used.

Dr. Dowell states that cotton can be dried by passing it through a dryer twice, using a temperature of 150 degrees and 170 degrees Fahrenheit. However, this is likely to slow the ginning operations because not enough cotton can be passed through the gins to keep them running at full speed.

THE COTTON SITUATION IN U.S.A.

The following is extracted from the November, 1937, report of the National City Bank of New York.

The cotton situation is certain to be threshed out again at the special session of Congress, which has been called partly for the purpose of enacting new farm legislation. It is indisputable that a "cotton problem" exists, for despite the years of effort to improve the situation, cotton supply and demand are almost as badly out of balance as they were at the bottom of the depression. The price is sharply below a year ago, and probably would be even lower except for Government loans; and cotton growers' cash income would be very much lower than last year were it not for Government payments and market support. Moreover, the problem is more complex and difficult than it was in 1933, by reason of the phenomenal increase in foreign cotton growing and the narrowing of the world market for our cotton.

There are many persons familiar with the situation who sincerely believe there would be no cotton problem today but for the Government intervention that has persisted since 1929, but of course this belief does not protect the market from continued intervention. The strongest opponents of the programme recognise that at present Government with-

drawal is impracticable. After following policies which have contributed greatly to the loss of one-third of the foreign market, it would be hard to justify throwing cotton growers back upon their own resources, with a crop that is possibly 5,000,000 bales greater than the markets need. On the other hand, it is plain that no lasting progress has been made toward balancing production and demand, or toward making the cotton growers prosperous on a self-supporting and therefore lasting basis. As long as the markets are out of balance the drafts on the Treasury for "benefits" and "adjustment payments," to "equalise" the income of cotton farmers with that of other groups, will burden the tax-payers.

What policies can be put into effect which will ultimately put the cotton growing industry of the South on a prosperous basis without Government financial aid? Clearly the way out is not restriction to domestic needs, which would reduce the acreage to 18,000,000 as has been suggested in some quarters, and probably less. This would involve moving half of the cotton farmers into other occupations, and scrapping half of the gins, warehouses, and transportation and merchandising facilities which have been created, ending the employment they give.

On the other hand, the record high yield per acre this season gives the clue to a constructive policy. It has been demonstrated over and over, on experimental areas, that the application of the most up-to-date cultural methods, use of the best seed and modern equipment, and thorough-going soil conservation practices, can produce per acre yields far in excess of the averages commonly recorded. Many experts think there is nothing impracticable in the idea that under acreage restriction the average yield over the Belt could be raised to between 300 and 350 lbs. per acre. Yields of this character, even on a controlled acreage of around 30,000,000, would mean low prices, and the low prices, if accepted without resort to pegging operations, would force countries which could not meet them out of the competitive race. On the other hand, they would reduce costs in this country far below any heretofore known, and put cotton growing on the sure foundation of the most efficient and lowest-cost operations.

This may appear fanciful to some, but is there any other real solution to the cotton problem? Accepting the fact that the Federal Treasury will be paying subsidies to cotton growers for some years to come, is there any hope of ending them at any time except by turning them into a powerful influence for increasing yields, improving quality and lowering costs? They already operate in that direction through the Soil Conservation Act, which tends to concentrate cotton growing on the best land of each farmer. However, should all farmers be entitled to benefits, even those whose best land is poorer than the poorest land of others? Should subsidies be paid to growers who are backward in their cultural methods and heedless in their seed selection, and thereby contribute to the deterioration in the quality of American cotton which is so much complained of? If the Department of Agriculture is to pay farmers, can it not choose what farmers to pay, and require them to plant seed of its selection and to adhere to prescribed cultural standards before they are paid? Is this too idealistic?

One of the great fallacies of the cotton programme is the assumption that all those who are engaged in cotton growing are entitled to remain in that occupation, even to the point of being supported by the rest of the people. All are eligible for the subsidies. This is merely protecting the inefficient at everybody's expense, and inevitably leads to balancing the market position on the basis of scarcity and high cost, instead of abundance and low cost. If the same principle were applied to all workers its fallacy would be obvious, for the scarcity would be general, and no one would be prosperous.

COTTON FUTURES

According to a Press release of the U.S. Dept. of Agriculture, cotton futures transactions on the New York Cotton Exchange, the New Orleans Cotton Exchange and the Chicago Board of Trade have been made public daily, as from December 2, 1937, by the Commodity Exchange Administration. The Administration release the volume of daily transactions, the amount of open commitments, and the change in open commitments from the previous day.

The figures on transactions as reported by clearing members on the New York Cotton Exchange are released each morning by the local supervisor of the Commodity Exchange Administration in New York, New Orleans and Chicago.

Although practically the entire cotton crop, which averages approximately 15,000,000 bales annually and comprises the principal money crop of about 2,000,000 American farmers, is bought and sold at a price based on futures prices, statistics never have been available concerning the volume or character of these futures transactions.

It is pointed out that the cotton exchanges perform a very useful purpose in furnishing a hedging or price-insuring market, but it is desirable that there should be the most complete information available to the public concerning the transactions on them. The figures which are made public each day will be in equivalent 500-pound bales by individual futures as well as all futures combined, so that every farmer in the country who is interested in them will be able to read and understand them.

Fifteen years ago when the Commodity Exchange Administration was set up to control the trade in grain futures, there was practically no information available as to volume of trading and open commitments in grain futures. Since then the most complete and comprehensive facts and figures concerning the trade in grain futures have been compiled, analysed and published.

It is the purpose of the Commodity Exchange Administration to follow the same procedure in regard to cotton futures, so that the transactions on these important markets will be known not only to the large interests who have representatives on the floors of the exchanges but to

every farmer, merchant or miller who is not in a position to receive first-hand information.

Under the provisions of the Commodity Exchange Act, regulations were issued August 30 and became effective October 2, which required all futures commission merchants to report daily concerning the transactions in cotton futures of their customers as well as themselves. Spot cotton merchants and processors are required to report weekly concerning their operations on the cotton exchanges, while persons having an open interest in any one cotton future equalling or exceeding 5,000 bales must notify the Commodity Exchange Administration every day there is a change in their position.

IMPROVED GINNING METHODS

An exhibition of improved methods of cotton ginning was staged recently at the Mississippi State Fair.

The exhibit, the first of its kind ever shown at the State Fair, included two approved type cotton driers as developed by the Federal Cotton Ginning Laboratory at Stoneville, a model gin in operation, and cotton samples of many kinds.

A working model of a commercially built vertical government type drier, constructed according to specifications of the Federal Cotton Ginning Laboratory at Stoneville, was in operation. A government model drier with complete installation showing how cotton travels from wagon through drier and to gin stands was shown. The small gin, operated to show how cotton is ginned, created much interest.

The value of sharp saws and proper adjustment of seed roll was demonstrated. New and old saws, new and old gin ribs, new and old gin brushes were shown, and results of ginning with each, so that farmer and ginner might see the possible loss at the gin. Gin saws that have been sharpened enough to decrease their diameter $\frac{1}{8}$ of an inch, have lost 20 per cent. of their original capacity. Saws in this condition require more time to gin a bale of cotton, costing the ginner more money to operate his equipment.

Today the preparation of cotton is as important in the sale of that cotton as grade and staple length. If the farmer would pick his cotton dry and carry it to the gin dry, these losses would not occur.

Both samples of lint cotton and pictures were displayed to show the difference in dried and undried cotton, clean picked and trashy picked cotton, cotton ginned with a loose and tight seed roll, cotton picked soon after opening, and cotton left in the field unal exposure lowered the grade, cotton ginned with good and bad saws, cotton ginned with good and bad brushes, cotton picked dry and ginned dry, cotton picked wet and ginned wet, and other factors of interest to the public.

That the authorities in the cotton growing districts of the United States are fully alive to the question of the exercising of great care in

the harvesting and the ginning of the current crop is evident from the instructions given recently to county agricultural agents and cotton ginner in West Texas by Mr. F. E. Lichte, Cotton Gin Specialist :—

Due to the large cotton crop in West Texas and the unusually fast movement of cotton to the gins, there is a great danger that the farmers as well as the ginner will suffer serious losses unless more than ordinary care is exercised in harvesting and ginning this crop.

Reports of poorly ginned cotton are being received, and it is evident that this situation will grow worse unless the farmers and ginner co-operate in discouraging the present harvesting and ginning tendencies. The farmer has a right to expect good ginning, but he must realise his own responsibility and co-operation in bringing that condition about. No ginner, unless he has special equipment, can turn out a good sample from wet cotton caused by dew, rain or green, sappy bolls. Also a ginner cannot turn out good samples by running at top speed and with tight rolls even if the farmer has brought in clean-picked, dry cotton. Therefore, there is a dual responsibility on the farmers and ginner in proper harvesting and ginning, and careful handling could easily result in thousands of dollars additional income to farmers and great savings to ginner.

U.S. FAVOURABLE PRODUCTION COSTS

Mr. C. T. Revere, of the New York firm of Munds, Winslow & Potter, recently made the following statement in one of his firm's weekly circulars :—

When it comes to *actual production costs*, can we (the United States) grow cotton as cheaply as any other country? We believe the answer should be in the affirmative. No other portion of the world possesses such advantages: climate, including abundance of seasonal rainfall and favourable temperatures; fertility of soil; trained labour; superior cultural equipment; unparalleled handling facilities; incomparably better transportation system.

Here we have a combination that contrasts with the disadvantages in many other cotton growing districts—climatic uncertainties, primitive cultural equipment; labour in many areas still unacquainted with the complexities of cotton culture; antiquated handling methods; inferior transportation; necessity in important areas of building and maintaining expensive irrigation projects, to say nothing of reserving ample acreage for food crops.

This season the average yield per acre for the American cotton crop will approximate 260 pounds. Even conceding that weather was highly propitious, there is no reason why, with selected acreage, intensive cultivation, and soil conservation methods, we cannot far exceed this record. No other major cotton producing country, also constituting an exporting competitor, compares with this showing, with, of course, the exception of Egypt with her five-year record of approximately 454 pounds

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per acre. India has a five-year average of only about 110 pounds, and Brazil about 159 pounds. China's per acre yield averages a trifle above 210 pounds per acre, but thus far this country has been a minor factor in export markets. The same can be said of Russia, with a per acre yield in the last five years ranging from a low of 171.7 pounds to a trifle over 309 pounds reported last season.

With advantages afforded by superior soil and climatic conditions, handling, and transportation facilities, it would seem that we can practically overcome the handicap of cheap labour in the "outside" areas. However, two other requirements remain to be met. Provision for dollar exchange, or interchange of our cotton for goods, and, unquestionably most important of all, the maintenance of the "American standard of living." With our farm population, food requirements fill the first place in the family budget, but automobile expenses have largely superseded clothing as the second necessity, and of course completely out-ranking all others.

CONTROL OF ROOT ROT BY CROP ROTATION

The following is an article written for the "Acco Press" (Anderson, Clayton & Co.), by Mr. H. E. REA, Agronomist, Texas Agricultural Experiment Station.

A marked reduction in root rot of cotton was secured at the Blackland Experiment Station at Temple, from 1931 to 1936, in cotton planted on the same land only once every four years compared with cotton planted on the same land every year. Root rot killed only 25 per cent. of the cotton plants on the rotated land as against a kill of 67 per cent. on the non-rotated land. This reduction in root rot was associated with an outstanding increase of cotton yield. Cotton in the four year rotation made an average yield of 321 pounds of lint per acre while non-rotated cotton yielded only 237 pounds. During the time cotton was not planted on the rotated land oats, corn, and grain sorghum were grown. In common with all other grass plants, both wild and cultivated, these grain crops are immune to root rot. These crops are referred to as non-susceptible crops, while crops or weeds on which root rot thrives are referred to as susceptible plants.

The gross average annual cash income acre value of the crops grown on the rotated land based on the average price of the crops grown during 1931 and 1936 was \$16.42 compared with \$21.73 for the cotton on the non-rotated land. However, contrary to the popular impression, the net incomes per acre for these two cropping systems were practically the same. Due to differences in the expense of growing, harvesting, and marketing the crops, the estimated net income per acre for the non-rotated land was only \$7.90 compared with \$7.79 for the rotated land.

Under these conditions the Blackland farmers apparently may make

full use of the necessary cropping systems in controlling root rot without any material sacrifice of net income per acre. The cropping system necessary to control cotton root rot may be applied to the entire farm or to restricted portions of the farm where the root rot is most severe. The procedure to follow in each case should be determined by the severity and distribution of the disease and the opportunities of the farmers to utilise increased quantities of feed to advantage.

The cropping systems studied at Temple were on land that was severely infested with root rot and that was relatively free of susceptible perennial weeds. Cotton was grown continuously on some areas while on other areas cotton was grown twice every three years, once every two years, once every three years, and once every four years. Root rot was very severe throughout the test period on the continuous cotton area and it was also severe on all rotated areas in which cotton was planted more frequently than once every three years. Root rot was not eradicated on any of the areas, but outstanding control of this disease was secured on the land planted to cotton only once every four years. Moderate control was also obtained on land planted to cotton once every three years.

Results similar to those secured at Temple have been obtained in practically all the rotations and clean fallow experiments conducted by a number of root rot workers at other places. All of these tests emphasise the necessity of providing at least a two-year period free of root rot susceptible weeds and cultivated crops if substantial control of this disease is to be expected. A three-year non-susceptible plant period as provided in a four-year rotation has given outstanding control wherever it has been tested. The unanimous opinion of the various state and federal root rot workers, as expressed in a recent conference at College Station, was that proper crop rotation is the most practical available means of controlling the root rot disease.

In order to make the best use of the severely infested land during the time cotton is not grown, it is often desirable to employ several non-susceptible crops. A four-year rotation of cotton and non-susceptible crops is greatly facilitated in those portions of the Blackland region and on those farms where corn, oats, and grain sorghums are all well adapted.

In many instances where adequate supplies of stock water are available and other facilities are favourable, the ultimate income possibilities of the non-susceptible feed crop may be greatly increased by supplementing crop farming with desirable livestock enterprises. Many cotton farmers near cities where fluid milk consumption is high or on all-weather roads will probably find that they can supplement their cotton farming with a few dairy cows to considerable advantage. More isolated farmers located on less serviceable roads probably can use their feed to fatten beef cattle most profitably. Many Blackland farmers no doubt can use moderate size flocks of sheep to increase their farm income. The type and combinations of livestock that will be most profitable will depend on the resources of the individual farm, but wherever dependable supplies of stock are available, saleable livestock as an addition to crop farming will greatly simplify the solution of the root rot problem.

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As the farmer attacks his root rot problem through the combination of non-susceptible feed crops and livestock, he probably will soon find that he is rapidly developing a type of farming that is much more profitable and dependable than strict cotton farming will likely ever be. One of the most encouraging features to this approach to the root rot problem is that many of the Blackland farmers can start the change toward a more profitable type of farming with rather minor enterprises. An improved pasture along the creek and other drainage ways on the farm or the utilisation of a trench silo may easily be the early steps to an increased prosperity on many farms.

THE RELATIONSHIP BETWEEN U.S. COTTON EXPORTS AND U.S. NATIONAL POLICY

The following is extracted from an article published in "Current Farm Economics, Oklahoma," entitled "Factors to be considered in Framing Agricultural Legislation."

"For the Cotton South as a whole, 50 per cent. or more of the total cotton crop has been exported annually. Fifty-six per cent. was exported in 1935-36 and about 44 per cent. was exported in 1936-37. It is likewise known that something like 50 per cent. of the people in the Cotton South are dependent for their income directly or indirectly upon cotton; that cotton is our greatest cash crop; and that about one-third of the farm population of the United States is engaged in producing cotton. These facts are well known to most people in touch with the production and distribution of cotton.

"A narrow policy of international relationship that ignores the advantages which the various peoples of the world have in production of different commodities is sure to do a great deal of harm, not only to this nation (U.S.A.), but to other nations with whom we would otherwise have profitable trade. A self-sufficiency among nations is no more sensible than it would be for each of the 48 American states. A sound solution of the agricultural problem demands a more constructive attitude toward the advantages to be gained by free and unhampered intercourse based on natural economic advantages of the various peoples of the world. Until our national policy recognises these fundamental truths, international relationships will be important factors in maintaining the present unfavourable economic position of American agriculture."

CROP REPORTS

Messrs. Weil Brothers, Montgomery, Alabama, in their semi-monthly crop letter dated January 17, 1938, state :—

Although the weather was propitious for farm work in a great many sections, reports of our correspondents in the Western and in the Eastern Belt, indicate that very little farm work has been done up to January 15. The uncertainty

of farm legislation in Washington leaves the farmer in a quandary ; over the whole belt his mood is aimless—he does not know where to begin. Neither the Senate Bill nor the House Bill finds favour with farmers generally. The majority will be compelled to abide by whatever Bill is passed in Washington because, otherwise, they cannot obtain the 3 cents. per pound subsidy. They are willing to cut their acreage under the Soil Conservation Plan, by renting it to the Government. We are of the opinion, however, that without subsidy from the Administration and without the interference of any Farm Bill which may be passed, acreage would be rigidly reduced, because of necessity, if for no other reason.

The *American Cotton Crop Service* in their report dated January 19, state as follows :—

During the week ending January 17, early ploughing or land breaking made good progress in the southern third of the Belt according to our crop reporters. Ploughing was reported as well advanced in the southern half of the Eastern Belt. In the middle third of the Belt ploughing usually gets well underway by February 1, and by March 1 in the northern third. While the uncertainty over the details of the 1938 Farm Bill is retarding farmers' plans, seasonal land preparation is going ahead at a normal rate. Planting will begin next month in extreme South Texas. One of the unusual features of the present situation is the fact that most of the growers in the southern third of the Belt sold their 1937 cotton production around the 9-cent level and did not have to sign for 1938 acreage control or a Government loan. Judging by personal interviews with both large land owners and tenant farmers, the little interest shown by cotton growers in the meetings of Congress indicates the Soil Conservation Programme of 1937 is about all the cotton farmers think necessary to cope with the present situation. Our early season crop reports indicate some reduction in 1938 cotton acreage. We believe, however, that unless the New Farm Bill has compulsory acreage reduction features, the extent of acreage reduction will follow closely the custom of reducing acreage the year following low prices rather than any volunteer mass effort to reduce acreage to the 25,000,000 acre figure.

SUPPLY AND DISTRIBUTION OF ALL COTTONS IN THE UNITED STATES

(Figures compiled by the New York Cotton Exchange Service)

(In Bales. Linters not included)

SUPPLY	1934-35	1935-36	1936-37	1937-38
Stock in U.S. Aug. 1 (a)	7,744,000	7,208,000	5,409,000	4,499,000
Production (b)	9,372,000	10,326,000	12,100,000	17,948,000
Imports, etc., Aug. 1-Dec. 31	91,000	83,000	98,000	122,000
Supply Aug. 1 to Dec. 31	17,207,000	17,617,000	17,607,000	22,569,000
DISTRIBUTION				
Consumption U.S., Aug. 1-Dec. 31	2,134,000	2,421,000	3,177,000	2,651,000
Exports by U.S., Aug. 1 Dec. 31	2,408,000	3,418,000	2,946,000	3,244,000
Distribution Aug. 1 to Dec. 31	4,542,000	5,842,000	6,123,000	5,895,000
Stock in U.S., Dec. 31 (a) (e)	12,065,000	11,775,000	11,484,000	16,671,000(d)
Added Supply, Jan. 1-July 31 (c)	178,000	183,000	353,000	
Supply Jan. 1-July 31 (e)	12,843,000	11,958,000	11,837,000	
Consumption U.S., Jan. 1-July 31	3,227,000	3,927,000	4,773,000	
Exports by U.S., Jan. 1-July 31	2,408,000	2,622,000	2,565,000	
Distribution Jan. 1-July 31	5,635,000	6,549,000	7,338,000	
Stock in U.S., July 31 (a)	7,208,000	5,409,000	4,499,000	
Government-financed Spot Stock, July 31	5,125,000	3,237,000	1,665,000	

(a) Includes Government-financed spot cotton.

(b) Exclusive of ginnings before August 1; 1937-38 crop figure based on Government estimate as of December 1 converted to running bales.

(c) Imports, city crop accumulations, and end-season ginnings, minus cotton destroyed.

(d) Includes about 6,300,000 bales in Government Loan Stock.

(e) Includes unpicker portion of crop.

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EGYPTIAN GOVERNMENT CROP ESTIMATE

The Ministry of Agriculture in its latest cotton crop estimate, has reduced its October estimate by 127,000 cantars, to 10,796,000 cantars, as compared with last year's final figure of 8,904,000 cantars. The details are shown in the following table :—

					(Cantars : 000's omitted)			
					1937-8		1936-7	
					Dec. est.	Oct. est.	Dec. est.	Final est.
Sakellaridis	..	..	..	..	517	552	565	520
Other long staples	..	..	..	..	3,044	3,069	2,511	2,336
Medium staples	..	..	..	..	154	153	178	147
Short stapler	..	..	..	..	7,081	7,149	5,977	5,901
Total	..	..	..	..	10,796	10,923	9,231	8,904

DECEMBER GINNING REPORT

Egyptian Cotton Ginned to end of December, 1937.—The Egyptian Ministry of Agriculture has issued the following ginning report of cotton ginned in all the factories in Egypt since the beginning of the season to the end of December (in Cantars) :—

		1937-1938		1936-1937		1935-1936	
		Dec.	Nov.	Dec.	Final	Dec.	Final
Sakellaridis	..	315,500	244,358	386,113	501,252	624,441	853,613
Other Long Staple	..						
Varieties	..	1,922,000	1,521,744	1,694,663	2,292,010	1,261,060	1,656,571
Medium Long	..						
Staple Varieties	..	106,000	88,941	100,314	145,311	152,650	197,286
Medium Staple	..						
Varieties	..	4,092,900	3,433,896	4,471,424	5,840,306	4,208,293	5,181,930
Total	..	6,436,400	5,288,939	6,652,514	8,778,879	6,246,444	7,889,400
Scarto	..	107,900	87,450	136,295	196,881	131,236	176,131
Total, including	..						
Scarto..	..	6,544,300	5,376,389	6,788,809	8,975,760	6,377,680	8,065,531

THE GINNING OF EGYPTIAN COTTON

In compliance with the wish expressed by the International Cotton Committee, the Egyptian Minister of Agriculture has issued an arrete forming a committee composed of representatives of the Egyptian Ministries of Agriculture and Commerce and Industry and the Egyptian Cotton Ginners' Chamber to study all questions appertaining to cotton ginning and to suggest the best measures for the improvement of this industry and for the maintenance of the good reputation of Egyptian cotton.

The Committee has been formed as follows: Hussein Enan Bey, Secretary-General of the Ministry of Agriculture (President), Dr. Lawrence Balls, Zakaria Haggag Eff., Mohamed Fuad el Gammal Eff., representing the Ministry of Agriculture, Dr. Hussein Tewfik Tabuzada Eff., representing the Ministry of Commerce and Industry, Abdullah Fikri Abaza Bey, representing ginners in Upper Egypt, Abdel Aziz Radwan Bey, representing ginners in Lower Egypt, M. Alleman, the last three representing the Egyptian Ginners' Chamber as original members and M. Clambokides and M. Pinto as provisional members with Abbas Nafi' Eff., a Sub-Inspector in the Ministry of Agriculture as Secretary.

(*The Egyptian Gazette*)

STRENGTH, GRADE AND PRICE OF EGYPTIAN COTTONS

The following spinning test report of the 1937 Egyptian cotton crop has been prepared by Mr. H. A. Hancock, the Spinning Technologist to the Egyptian Ministry of Agriculture, and was recently published by the Ministry:—

	Lea Strength Product 60's carded	Card Waste % (taker-in)	Staple Length 1/32 in.	Hair Weight 100 mgm. p.cm.	Spot Price (dollars) 3 year avge.
<i>Sakel</i>					
F.G. ..	2615 (2620)	3.8 (3.8)	47 (46)	135 (136)	20.8
F.G.F. ..	2375 (2380)	5.4 (5.8)	46 (46)	128 (133)	16.9
<i>Sakha 4</i>					
F.G. ..	2540 (2665)	4.1 (4.1)	50 (47)	132 (133)	19.7
F.G.F. ..	2385 (2500)	5.0 (5.3)	50 (46)	118 (126)	16.7
<i>Maarad</i>					
F.G. ..	2515 (2480)	3.4 (3.3)	51 (48)	133 (134)	19.3
F.G.F. ..	2250 (2300)	5.8 (5.0)	50 (46)	132 (126)	16.9
<i>Giza 7</i>					
F.G. ..	2455 (2435)	4.3 (4.4)	46 (44)	159 (149)	18.1
F.G.F. ..	2180 (2230)	7.0 (6.9)	44 (43)	151 (141)	15.5
<i>Giza 12</i>					
F.G. ..	2235 (2285)	4.6 (4.7)	46 (45)	160 (148)	(17.2)
F.G.F. ..	1885 (2050)	6.8 (6.9)	46 (45)	157 (138)	(14.2)
<i>Uppers</i>					
F.G. ..	1735 (1710)	5.9 (6.9)	40 (40)	174 (183)	15.5
F.G.F. ..	1680 (1790)	9.7 (10.1)	39 (40)	156 (154)	14.0
<i>Zagora</i>					
F.G. ..	1570 (1615)	6.7 (6.3)	39 (41)	194 (187)	14.9
F.G.F. ..	1505 (1455)	8.8 (8.9)	39 (40)	180 (183)	13.9

(Comparable data for 1936 Crop in brackets)

Notes.—The strength value quoted is the product of lea strength in lbs. times the observed counts, the yarn being 60's double carded, 3.6 twist factor. Card Waste % is the taker-in waste only, the sum of two cardings. Staple lengths are determined from the Balls Sorter Diagram, quoted in $1/32$ inch units; on multiplying by 0.8 they are converted to millimetres. Spot prices are quoted in Alexandria dollars per kantar, averaged for the three seasons beginning 1934-35; on dividing by two, the prices are converted to approx. pence per pound at Liverpool; the Giza 12 price is based on one season only.

All of these samples were of "good staple" and are fully representative of their type, being obtained from about 20 different trade sources and mixed together. They were drawn from bulk deliveries sold in the ordinary course of business to spinners all over the world, and are in no sense experimental growings. The figures for Sakel, Giza 7, Uppers and Zagora are averages of three independent spinnings; averages for two independent spinnings are given for the other varieties, except Sakha 4 and Giza 12 in FGF, which grades are very rare this year and only five samples were obtained. All 1936 crop figures are based on re-spinnings done at the same time as the new crop spinnings.

Discussion of Results.—Most of the varieties are not much changed in yarn strength as between the new crop and the old, except Sakha 4, which is weaker. All varieties except Ashmouni are of slightly longer staple in the new crop; Giza 7 is also of coarser fibre (as shown by the hairweight) but its longer staple maintains the yarn strength. Uppers FGF, which was abnormally strong in 1936, has this year reverted to normal. Card wastes are on the whole unchanged.

(*Egyptian Gazette*)

EGYPT'S COTTON POLICY

Makram Ebeid Pasha, Minister of Finance, made a long statement on the Government's cotton policy in the Chamber of Deputies recently in reply to Deputy Abdel Razzak Wahba el Kadi.

He said that in his Budget statement he had remarked that there was no fear of cotton prices falling, and for this reason he had been criticised. But in making this remark he had not anticipated the large increase in acreage and yield in the United States.

He pointed out that the Egyptian Government had made a number of proposals for improving the position and these had been unanimously approved by the Higher Economic Council. Nevertheless, prices of cotton, like any other basic commodity, were subject to world factors over which Egypt had no control.

The Government, however, was keeping a careful watch on market developments in order to protect the best interests of the farmers. Moreover, it was now considering the imposition of a margin on contract sales to check speculation. Other measures envisaged were the creation of a special body to consider all questions appertaining to cotton whether from

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the agricultural or commercial points of view, especially propaganda abroad for the opening of new markets and the encouragement of the local textile industry. It was also intended to increase the capital of the Agricultural Credit Bank to enable further advances to be made to farmers both at plantation and harvest so that they would not be compelled to sell their cotton at prices under contract before the picking.

In conclusion, the Minister said that he wished to draw the Chamber's attention to the danger of exaggerated accounts of the fall in cotton prices which had an unfortunate psychological effect on farmers and encouraged "bears."

The Government was quite aware of the loss resulting from lower cotton prices, but this, it should be remembered, was offset to a certain extent by the increased yield. *(Egyptian Gazette)*

CHECKING FALL IN COTTON PRICES

The Egyptian Chamber of Deputies recently discussed the Proposal Committee's report on the proposal made by Deputy Mohamed Tayel Dabbous regarding checking the fall in cotton prices.

The report stated that the Deputy's proposal was divided into four parts :

- (1) The opening of new markets for Egyptian cotton, if necessary by barter, with such countries as Russia, Germany, Italy, Japan and Turkey.
- (2) To limit cotton acreage to one-third for three years with severe penalties for offenders.
- (3) To prevent any farmer from selling his cotton to merchants under the contract rates.
- (4) To instruct the Agricultural Credit Bank to advance farmers every April L.E.4 per feddan of cotton and the balance of 85 per cent. of the loan after the picking, also to reduce the rate of interest on advances for cotton or cereals from 6 to 4 per cent. for individuals and 4 to 3 per cent. for co-operators' societies.

The Committee believed that the first proposal was worthy of further study. The second had already been shown by experience to be a failure and prejudicial to the country's wealth. The third and fourth were not worth consideration. The Committee therefore suggested that the first proposal should be referred to the Finance Committee for further study and the remainder rejected. *(Egyptian Gazette)*

THE EGYPTIAN COTTON LOANS

According to the Cairo correspondent of the *Manchester Guardian* the Egyptian Agricultural Credit Bank, which was authorised at the end of September to increase its loans on cotton to farmers from 80 per cent.

to 85 per cent. of the market price and on a maximum of 300 cantars instead of 100 cantars, reported about the middle of November that it had so far made advances on 597,000 cantars, against a total of 330,000 cantars in 1936-37 and 560,000 cantars in 1935-36. This means that barely 6 per cent. is being held by the bank, and even this may not be held for long. Moreover, as most farmers have already made arrangements for their crops, it seems unlikely that the bank's holding will be greatly increased beyond the present figure, which is only 37,000 cantars higher than that of two seasons ago. Although the Agricultural Credit Bank was the only one authorised to grant such facilities (critics say that they should have been given to all banks), many others conduct similar business. It is safe to assume, however, that if the Agricultural Credit

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Bank's higher loans have not resulted in a much greater hypothecation it is unlikely that there is any material change in the position of other banks. Some growers and their representative bodies are still agitating for the Government to lend more support to the market in order to raise prices, but at the moment there seems no possibility of any action of this kind, as the majority of the cotton trade are strongly opposed to official interference.

MAP OF EGYPTIAN COTTON AREAS

The statistical section of the Egyptian Ministry of Agriculture has just issued a pictorial map of Egypt, showing in colours the area and varieties of Egyptian cotton planted in each district during 1937. The reference map, which can be obtained from the Ministry on application, will prove particularly helpful to cotton merchants and cotton spinners desiring specialised information concerning the areas from which any particular variety of cotton is derived.

MARKET REPORTS

Messrs. Reinhart & Co., Alexandria, Egypt, state as follows under date of January 21 :—

The undertone of the Spot Market was more cheerful than that of the futures thanks to fresh buying interest coming from India and the Far East. Premiums of Ashmouni and Giza 7 are sustained, and there is also a better demand for Maarad and Zagora. Total transactions for the week are returned at 11,424 bales.

Messrs. Levy, Rossano & Co.'s report dated January 14 contains the following :—

The Spot market has been a little more active the last few days, but receipts which are still below the figures for the corresponding period last year, are still more than sufficient to meet demand.

Giza premiums continue to advance, and it is our opinion that we shall see still higher prices in the near future.

Ashmouni and Zagora are offered more freely without any effect so far on premiums.

Messrs. Alexandria Commercial Co. (S.A.), Alexandria, in their Weekly Report, dated January 21, state as follows :—

ASHMOUNI.—The demand for this variety has been well maintained with a small increase in premiums paid for FGF and above. Low cottons are very scarce on the market but there is not a big inquiry for these grades.

ZAGORA.—Had a very poor offtake. Interest was centred mainly on the top grades. Premiums were without change.

GIZA 7.—Was in good demand for all grades. Below FGF offerings were scarce. Premiums were a little dearer.

SAKEL.—Was very neglected only a very small turnover was registered.

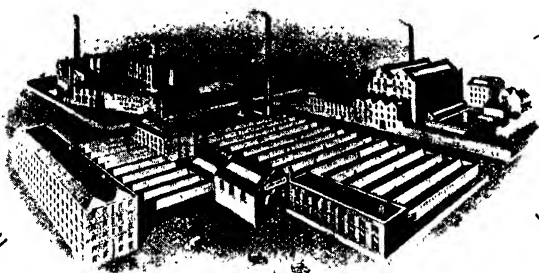
OTHER VARIETIES.—There was some inquiry for Maarad with premiums tending to harden. A small business was also done in Fouadi and Sakha 4.

CROP 1938.—The first news we have received regarding preparatory work on the land for the new crop indicates that all over the Delta sowing will be fairly early and in some districts even earlier than last year. It is naturally very early to discuss the acreage which will be planted this year, but from first indications it would seem that it will be more or less the same as last year.

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THIRD COTTON FORECAST, 1937-38

This forecast is based upon reports furnished by the undermentioned provinces and States, which practically comprise the entire cotton area of India. It deals with both early and late varieties of cotton and relates generally to conditions up to the beginning of December 1937.

The total area sown amounts to 24,276,000 acres, as against 23,420,000 acres (revised) at this date last year, or an increase of 4 per cent. The total estimated yield is 5,434,000 bales of 400 lbs. each, as compared with 5,374,000 bales (revised) at the corresponding date last year, or an increase of 1 per cent.

The present condition of the crop, on the whole, appears to be fairly good. The detailed figures for the provinces and States are shown below.

Provinces and States	AREA	OUTTURN	YIELD PER
	Acres (thousands)	Bales of 400 lbs. each (thousands)	ACRE lbs.
Bombay (a)	5,464	1,165	85
Central Provinces and Berar ..	3,993	800	80
Punjab (a)	3,961	1,311	132
Madras (a)	2,119	440	83
United Provinces (a)	612	204	133
Sind (a)	1,038	388	150
Bengal (a)	94	31	132
Bihar	43	9	84
Assam	45	24	213
Ajmer-Merwara	37	15	162
North-West Frontier Province	21	4	76
Orissa	8	1	50
Delhi	2	1	139
Hyderabad	3,286	514	63
Central India	1,320	152	46
Baroda	914	172	75
Gwalior	713	120	67
Rajputana	528	73	55
Mysore	78	10	51
TOTAL ..	24,276	5,434	90

(a) Including Indian States.

On the basis of these figures, the average outturn per acre of the present crop for All-India works out at 90 lbs., as against 92 lbs. at this time last year.

A statement showing the present estimates of area and yield according to the recognised trade descriptions of cotton, as compared with those of the preceding year, is given below.

Descriptions of Cotton	Acres (thousands)		Bales of 400 lbs. each (thousands)	
	1937-38	1936-37	1937-38	1936-37
Oomras—				
Khandesh	1,287	1,274	319	267
Central India	2,033	(a)1,908	272	268
Barsi and Nagar	2,503	1,935	411	340
Hyderabad-Gaorani	912	834	137	140
Berar	2,784	2,786	559	572
Central Provinces	1,209	1,255	241	253
TOTAL	10,728	(a)9,992	1,939	1,840
Dholleras	2,232	2,391	448	468
Bengal-Sind—				
United Provinces	612	(a)700	204	(a)175
Rajputana	565	(a)566	88	(a)85
Sind-Punjab	2,583	2,501	870	915
Others	57	(a)45	12	9
TOTAL	3,817	(a)3,812	1,174	(a)1,184
American—				
Punjab	1,791	1,638	596	604
Sind	648	529	238	232
TOTAL	2,439	2,167	834	896
Broach	1,458	1,438	355	324
Coompta-Dharwars	1,023	1,087	146	165
Westerns and Northern	1,348	1,368	153	151
Cocanadas	132	152	24	26
Tinnevellies	326	311	84	80
Salems	164	149	32	29
Cambodias	466	417	190	168
Comillas and other sorts	143	(a)136	55	(a)43
GRAND TOTAL	24,276	(a)23,420	5,434	(a)5,374

(a) Revised.

The area sown with cotton in Burma during the current year was estimated in October last at 544,000 acres, as compared with 519,000 acres, the actual area under the crop in 1936-37. The condition of the standing crop was reported to be generally good.

COMPLAINTS AGAINST INDIAN COTTON

On account of various charges which have been levelled against Indian cotton, the Indian Central Cotton Committee has considered it necessary to bring to light certain important factors about the real

situation with regard to the conditions in which Indian cotton is exported. One of the charges levelled against Indian cotton is that the Indian cotton cannot be obtained in its pure and natural qualities, and that there is invariably a tendency on the part of the exporters to mix staples and varieties. Another charge levelled is that the shipments of Indian cotton are not uniform and even-running. The third complaint often made is about the so-called false packing.

Whilst some of these charges are sweeping, and in some cases extravagant, it is admitted that there have been certain malpractices which had contributed greatly to the lowering of the reputation of the Indian cotton. Before the Cotton Ginning and Pressing Factories Act of 1925 came into being the malpractices existed to a certain extent. Such practices as the watering of cotton, mixing of cotton with inferior qualities were found in some of the ginning and pressing factories, as a result of which there was considerable loss to the trade. The Government felt that the time had come to take necessary steps to bring about the needed legislation to prevent the malpractices. Accordingly, in the year 1923, the Government introduced the Cotton Transport Act. The Act prohibited the import, for purposes of mixing and substitution, of inferior cotton into areas growing superior varieties within their jurisdiction. The Act is now in operation in several protected areas of Madras, Bombay, and Central Provinces. In addition, the Act covers Hyderabad, Sangli, Chota Udaipur, Rajpipla States, which have such legislations in force.

In the year 1925 the Government introduced another Act, called the Cotton Ginning and Pressing Factories Act, to provide for the better regulation of cotton ginning and cotton pressing factories. The Act *inter alia* made it obligatory on the part of the owner of every ginning factory to maintain at the factory a ginning report containing a record of all cotton ginned at the factory and the names of the persons for whom, and the dates on which, the cotton has been ginned and the amount ginned for each person. The Act also enjoined the owners to keep a press register containing a daily record of number of bales pressed in the factory, the serial number of each, and the name of the person for whom it had been pressed. Further, under the Act every bale of cotton bears the distinguishing mark of a particular press on the bale before it leaves the factory, and if any serious flaw is discovered it is always possible to trace the bale back to the factory where it was pressed.

Under both these Acts the breaches of the regulations were made punishable under law. Since the passing of these, many cases of punishment have been recorded, and it is a matter of gratification to note that there is considerable decrease in the number of offences year after year. The Acts had a very salutary effect and have brought an appreciable improvement by checking the evils mentioned above. Today, the Indian cotton can hold its own in the world's markets as regards purity and quality, though there is much scope for further improvement.

In spite of reforms introduced by the Government, and also the efforts of the Indian Central Cotton Committee to make the position of Indian cotton in regard to its quality above reproach, charges such as

mentioned above are being persistently levelled against the purity of Indian cotton by the foreign importers. The charges cannot be admitted. There are various indigenous mills in India who pay for and get the pure unadulterated cotton when they require it. Any reliable shipper in India can supply the right staple and quality, and the fact that there are many buyers in the United Kingdom and the Continent, who have been steady purchasers of such pure and unadulterated staple from year to year, will go to prove that India can supply clean cotton of good quality provided there are buyers who pay prices according to the intrinsic quality of the crop.

India occupies a prominent place among countries producing cotton of various staples and standards of cleanliness from 1 1/32 in. staple to very nearly the shortest staple produced anywhere. One of the best instances is the growth of Punjab-American cotton in Punjab and Sind. These Provinces produce long staple 289 F cotton with a staple length of 1 1/32 in., 4 F cotton with a staple length of 3/4 in., and deshi cotton with a length of 1/2 in. The mixing of the staples of various varieties is due to the demand from United Kingdom, the Continent of Europe, and Japan. If those consumers insist on getting the right quality they will have to pay according to the world parity of cotton of similar lengths and strength, and they can invariably get it.

As for the complaint that the shipments of Indian cotton are not uniform and even-running, it should be realised that uniform shipments depend upon the shipper more than upon the growth of the cotton being dealt in. There are firms in Bombay enjoying excellent reputations for decades for uniform shipments to such an extent that when a lot is purchased the buyer, instead of opening the permissible 5 per cent. of bales for sampling purposes, is satisfied with opening only one bale.

With regard to the third charge of false packing, they are few and negligible. Bombay handles more than 3,000,000 bales a year and the false packed cotton in the Bombay market is seriously handicapped both if found in a lot tendered for forward delivery or in a spot sale. This question of false packing is more in evidence in some of the varieties of cotton imported into India, particularly cotton imported from America. Taking all these factors into consideration, it can be said without hesitation that among the various varieties of cotton which are being marketed in the world, Indian cotton will stand the strictest test.

(Textile Industry and Exporter)

GOVERNMENT COTTON LOANS IN INDIA ADVOCATED

During the course of a paper written for a recent issue of the "Indian Textile Journal" by Mr. R. G. Saraiya, of the firm of Narandas Rajaram & Co., Bombay, makes the following recommendation :—

A liberal policy in regard to loans to cotton farmers should be adopted by the Government of India through the Reserve Bank and also by the

Imperial Bank and other banks and shroffs. It is a well-known axiom that a commodity cannot continue to sell over a period of time at under cost of production, so that, if the lending person has the patience and the purse to wait for a long period of time, say, a year in this case, he may find his confidence in the borrower as well as in the commodity amply justified. The Egyptian Government have been advancing loans at 4% to the cotton farmers and the American Government are also following the same policy. Would it not be possible for the Government of India to do something?

LOW PRICES FOR INDIAN COTTON

The effect of the present low level of Indian cotton prices on the cultivator and the measures which it might be possible to take to reduce his losses, were considered at a recent meeting of a Sub-committee of the Indian Central Cotton Committee. Several suggestions for relief were discussed but the two considered to be immediately feasible were the reduction of railway freights and the lowering of ginning and pressing charges. Recommendations have accordingly been made to the Central and Provincial authorities concerned.

YIELD PER ACRE IN INDIA

According to Messrs. Chunilal M. Mehta & Co.'s Indian Cotton Review for the season 1936-37, although cotton prices have fallen in the U.S.A., the aggregate income of the growers is fully kept up by benefit payment, subsidy and a large yield per acre. The average yield per acre in the U.S.A. during the last season was 198 lb., while the yield per acre for the current season is being estimated at 250 lb. In India the average yield per acre during 1936-37 was 100 lb. and this year (1937-38) it is not likely to be better. As a matter of fact if the high yield areas of Sind-Punjab, Punjab-American, Sind-American and Cambodia are excluded, the average yield per acre during 1936-37 does not exceed 75 lb. Undoubtedly, such a low yield accompanied by low prices makes cotton growing unremunerative over an extensive area in India. In order to secure a fair income to farmers it is necessary that the yield per acre should be raised in India by intensive cultivation. The authorities may very well pay attention to this aspect of raw cotton.

TECHNOLOGICAL REPORTS ON STANDARD INDIAN COTTONS, 1937

(TECHNOLOGICAL BULLETIN SERIES A, No. 39.)

The Technological Laboratory of the Indian Central Cotton Committee, as is well known, carries out thorough tests on the fibre properties, spinning performance and yarn characteristics of improved

varieties of cotton called the Standard Indian Cottons, and gives an authoritative valuation of them. The Director, Technological Laboratory, has brought out another bulletin which deals with the various improved strains grown regularly and on a large scale in the different provinces of India. It embodies following details for each variety :—

(1) Season in which it is grown, Botanical classification, history, district in which it is grown, period of growth, kind of soil, rainfall conditions, temperature, plant particulars (yield per acre, bolls per plant, seeds per boll, weight of seed and ginning percentage) and area under cultivation.

(2) *Graders Report*.—This includes class, colour, staple length, staple strength and regularity and quality values as interpreted by the trade.

(3) *Fibre-Properties* deal with fibre length; distribution of mean group lengths in $\frac{1}{8}$ inches; fibre length in inches; fibre length irregularity in per cent.; fibre strength; fibre strength per unit; fibre weight per inch; and the percentage of mature, half-mature and immature hairs.

(4) Spinning tests showing blow-room loss, card-room loss, and spinning Master's report on colour, cleanliness, feel, ginning and neppiness, seed conditions, card sliver and card web, weight of 10 flat-strips, yarn breakages in the ring frame, etc.

Yarn test results showing strength (lea, ballistic and single-thread), strength irregularity, counts strength and so on, as well as temperature, relative humidity prevailing in the spinning and the testing rooms.

These are only a few of the details of the report given for each cotton as tested during the year 1936-37.

Suffice it to say, that the publication may be used with advantage by the producer, breeder and spinning and weaving mills inland and abroad, who are concerned with Standard Indian Cottons.

This is the only scientific bulletin of its kind in the country which records tests carried out in the Committee's Laboratory and is issued regularly.

It is well known that the Indian Central Cotton Committee's programme includes propaganda for popularising staple varieties of cotton in the interest of the cultivators and the manufacturers. The bulletin under reference fulfils a useful purpose in the programme for Indian cottons in India and abroad.

The objects of carrying out these detailed tests on these cottons are as follows :—

(a) To record the seasonal variations in the fibre properties and spinning performance of the Standard Indian Cottons.

(b) To establish a scale of reference for entire Indian cotton crop of each season.

(c) To furnish necessary data for the correlation of fibre properties of Indian cottons with their spinning performance, and

(d) To place in the hands of the trade detailed information regarding Standard Indian Cottons.

Copies of the Bulletin can be had of the Secretary, Indian Central Cotton Committee, Vulcan House, Nicol Road, Ballard Estate, Fort, Bombay, at Rs. 1/8/-, postage extra.

EAST INDIAN FUTURES CONTRACTS AT LIVERPOOL

At an extraordinary meeting of the Liverpool Cotton Association held on January 24 a resolution was passed providing that no trading shall be permitted in the East Indian future delivery contract in months of delivery beyond January 1939, and that the contract shall be eliminated after the end of that month.

CROP REPORTS

Messrs. Volkart Brothers, of Winterthur, report as follows, under the date of January 31st :—

Conditions for the Indian crop have not been entirely satisfactory since we wrote our last report on December 7, 1937. The weather was partly too cold and partly too hot and has on the whole had a bad effect on the size of the crop, whereas the quality has not suffered.

We record a preliminary reduction of our Oomra crop estimate of about 100,000 bales to 1,750,000 bales and also for the crops in the Punjab (Bengals and American Seed) a reduction of about 100,000 bales becomes necessary.

The crop movement was extraordinarily slow this year. Whilst for the European spinner Indian prices appear prohibitive, if compared with American, they are disastrously low for the Indian farmer. It is not surprising therefore that only little business is done. The peasant prefers to hold his cotton back for the present, as long as he can afford to hold, in the hope for higher prices. How strongly this affects the crop movement is demonstrated by the following figures :—

<i>Oomra</i> arrivals in Bombay since September 1 ..	114,000 bales
against last year	750,000 bales
<i>Karachi</i> arrivals since September 1	613,000 bales
against last year	1,065,000 bales

Given a normal demand such a removal of the crop movement would have influenced prices even more. However, the small arrivals have been sufficient for the modest exports, which until the 13th inst., have been as follows :—

From <i>Bombay</i> to Europe ..	80,000 bls.	against	125,000 bls.	last year.
to the East ..	92,000 bls.	"	555,000 bls.	"
From <i>Karachi</i> to Europe ..	115,000 bls.	"	260,000 bls.	"
to the East ..	13,000 bls.	"	260,000 bls.	"
Total	300,000 bls.	"	1,200,000 bls.	"

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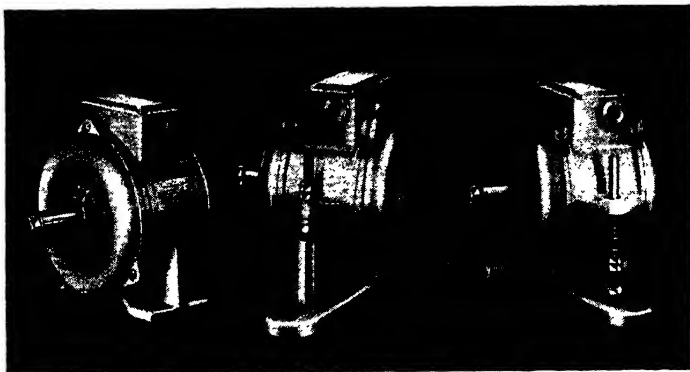
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SPUN RAYON YARN

The following article, written by Mr. Harold T. Heathcote, was taken from a recent issue of the *Textile World*.

The spinning of cut rayon or staple fibre is something similar to and yet quite different from the spinning of any other fibre. The unusual fact that all of the fibres in a lot have similar characteristics of diameter and length, due to their synthetic construction, must be kept in mind at all times. The following facts and suggestions should not be considered as hard and fast rules, but rather as a starting point or aid in the manufacture or contemplated manufacture of yarns from staple fibre.

The fibre most commonly used for spinning is $1\frac{1}{2}$ -deniers, $1\frac{1}{2}$ -in. staple of the viscose type; and this discussion applies to fibre with these specifications. The density of a mass of such fibres is greater than that of natural fibre, and this must be taken into consideration in all phases of manufacture. Also, it is emphasised that as much care should be taken in opening and running a new lot of staple rayon as would be exercised with any other fibre.

The first rule to be observed throughout the processing of staple rayon is proper regulation of temperature and humidity in all operations. The fibre is latent with static electricity and is aptly called "thirsty," due to a natural affinity for moisture.

PICKERS

The picker room should have a temperature of 70°F . and a relative humidity of 60 per cent. If proper temperature and humidity are not maintained, the fibres will cling to metal parts and cause bunchy, uneven laps. It must be remembered that the picking operation is not one of cleaning, but merely a desirable way of preparing the staple for subsequent processes. The staple should be opened and fluffed for 24 hours whenever possible.

For picking it is advisable to use a bale opener and a one-process picker equipped with double beaters of the Kirschner type. A beater speed of 500 r.p.m. and a fan speed of 1,000 r.p.m. are recommended. Set the grid bars to the beater at $\frac{1}{8}$ in. and make lap weight approximately 12 oz. per yard. The fan speed of 1,000 r.p.m. may be varied to bring

the material to the cage in proper form. Also 4 to 6 rovings run in at the calender roll with a split-lap preventer will eliminate split laps. It is a good idea to cover front cleaning bars and to leave grid bars open. Due to the density of rayon, the hopper feed must be watched and speed set accordingly.

CARDS

If the card is in condition to run a good grade of cotton, it can be used on staple rayon with very few changes. Temperature should be kept at 70°F. and humidity at 55 per cent. In some cases it is advisable to change tension gear if sliver runs slack. These changes in tension of web and sliver may be caused by either temperature or humidity variation. The card should be stripped at both cylinder and doffer every 5 hours. The licker-in is run at 340 r.p.m. Set short-nosed feed plate at 0.015 in. and flats at 0.022 in. Flats should be run between 1 and 1½ in. per minute. Spiral brush is speeded up in proportion. Production should be between 250 and 300 lb. per 40-hour week. Flat strips should be between 1 and 2 per cent. and may be re-worked. Fly waste runs 0.2 per cent. Draft is between 100 and 105. Incidentally, there is nothing to be gained by covering licker-in or cylinder screen, as waste will come out the side of the card if not allowed to drop through.

The drawing frame requires careful watching, as temperature and humidity have considerable effect on weights. Sizings should be frequent in order that weights may be kept as nearly uniform as possible. This should give a uniform weight to the back stock. Also it is much easier to control weights in succeeding operations if this condition is taken care of in this operation. Temperature is kept at 75°F. and humidity at 50 per cent.

Care should be taken during oiling, as oil spoils the fibres. Top and bottom clearers, as well as the frame, should be cleaned at every doff. Coiler and spectacle are taken out and cleaned frequently as there is a tendency for lint to accumulate at this spot. Rolls should be scoured every four weeks. Use leather on all lines of rolls. Keep tension on slack side, and draft between 5 and 5½ on each process. Front-roll speed should be 250 r.p.m. Roll settings are as follows :

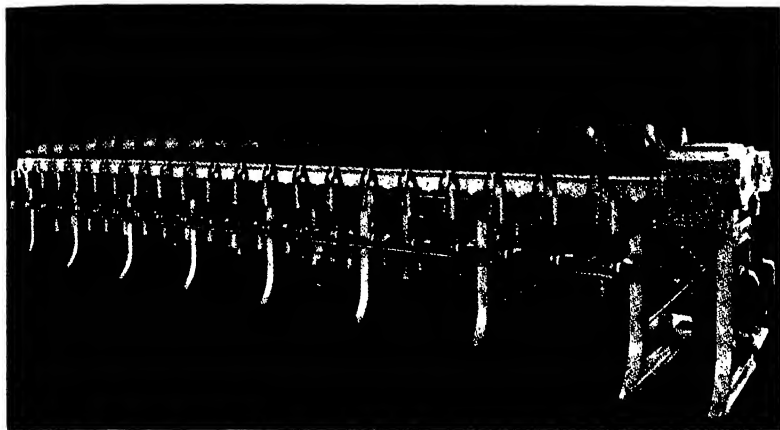
First to second—¼ in. over length of staple. Second to third—⅜ in. over length of staple. Third to fourth—½ in. over length of staple.

In later operations excessive drafts are to be avoided, due to the natural bulk or density of fibres in the cross section of the sliver. Drafting should be a gradual elongation of the sliver in all of the following processes.

SLUBBERS

The weights on slubbers should be watched very closely as a check on what might get by the drawing frames. However, if the foregoing suggestions have been followed up to and including this process, a roving should result that will ensure ideal spinning, even drafting, and eventually a quality yarn.

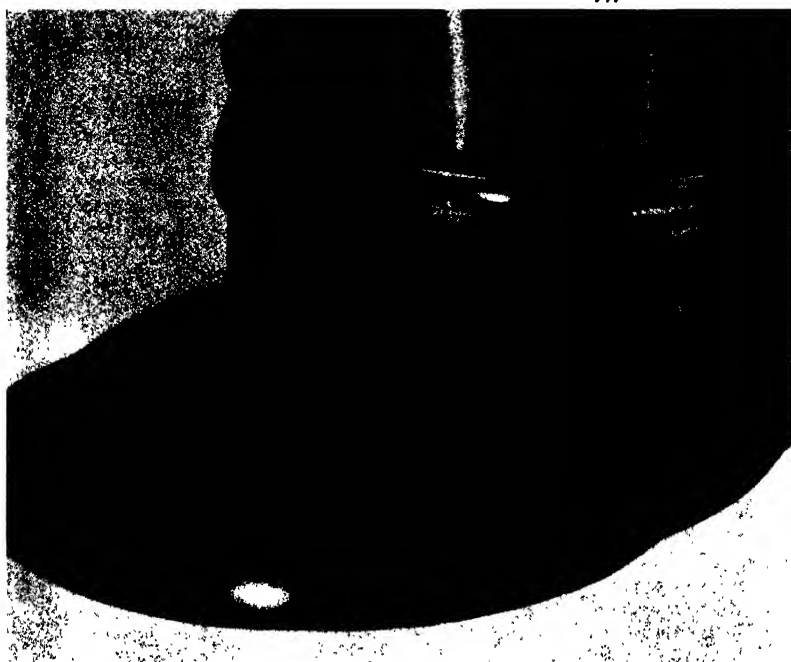
STYLE 42 MACHINE



The machine is a heavy machine incorporating the Rotary Traverse and designed for heavy work in the winding of jute, hemp, tow, and similar yarns. It is capable of winding packages of twenty pounds weight of uniform density, yet another illustration of our claim—a winder for every textile need.

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The frame should be cleaned thoroughly at the doff—especially flyers, clearers, and roller beams—to avoid bunches. Use paper tubes to keep sliver from being stained by either oil or shellac from bobbins. Also operatives should be taught to use whiting on the finger tips when piecing ends. Run tension as slack as possible to prevent stretching. It is advisable to have slots in hollow leg of flyer a trifle smaller than is common on cotton. This enables use of a slacker tension, which in turn helps to keep roving from being stretched. This applies to all fly frames. Use cork rolls on back lines and leather on front lines. Spindle speed should be 450 r.p.m. on a 12×6 frame. On 0.50 hank roving there are 0.59 turns per inch. Roll setting are as follows :

First to second— $\frac{1}{4}$ in. over length of staple. Second to third— $\frac{3}{8}$ in. over length of staple.

INTERMEDIATES

All rules for slubbers apply to intermediates. It is advantageous in this process to employ either glass or plated creel rods to present a smooth surface to the sliver, which in turn prevents bunches from accumulating and passing into the roving. Operatives should be instructed to piece up in creeling $1\frac{1}{2}$ in. from the end to prevent thin places in the roving. Spindle speed is 625 r.p.m. on a 10×5 frame. Roll settings are as follows :

First to second— $\frac{1}{4}$ in. over length of staple. Second to third— $\frac{3}{8}$ in. over length of staple.

From this point on, skewer points and creel steps should be checked to make sure the roving is not stretched by excessive tension due to the bobbins turning resistingly.

FINE FRAMES

The same rules applying to preceding operations of fly frames should be observed on fine frames. Spindle speed is 1,000 r.p.m. on 7×3 frames. Twist per inch on 3-hank roving is 1.492 ; on 6-hank roving it is 2.31. Rolls settings are as follows :

First to second— $\frac{1}{16}$ in. over length of staple. Second to third— $\frac{5}{16}$ in. over length of staple.

The foregoing can be changed to suit local conditions and, as previously mentioned, is intended merely to be a guide or starting point.

SPINNING FRAMES

In the spinning operation temperature and humidity control are of the utmost importance in transforming the roving into a perfect yarn. Cleanliness and careful piecing of roving in the creeling operation should be the watchword of the spinner. Here again glass or plated creel rods should be used to overcome the tendency for bunches to accumulate and pass into the yarn. Glass or porcelain steps in the creels, as well as skewer points, should be watched closely so as not to put undue strain on the roving and cause it to stretch. Excessive spindle speed and rail speed should be avoided so as not to put undue strain on the yarn, and also to prevent excessive fly waste.

It is just as important to watch out for oil and shellac stains at this process as at any other process. Traveller cleaners properly set will do much to prevent undue loading of the traveller and excessive tension on the ends. These also do their bit towards the elimination of bunches. Clearers should be cleaned every 2 hours at least, and all flannels should be in place and in good condition. It is advisable to have as much cleaning as possible done on each frame at the doff. Top rolls should be cleaned and oiled regularly, and worn cap-bar nebs should be replaced to keep roll settings uniform.

Maximum breaking strength seems to be obtained by using between 2.75 and 3.50 as a twist multiplier, depending largely on the yarn number. Avoid the use of reworked waste, and keep fly from other fibres from entering the work at all points. This will overcome a lot of trouble in the finished product. Finally, if the same general rules and care are exercised in the manufacture of spun rayon as in the manufacture of long-staple cotton on fine numbers, very little trouble will be experienced and a good product should be the result.

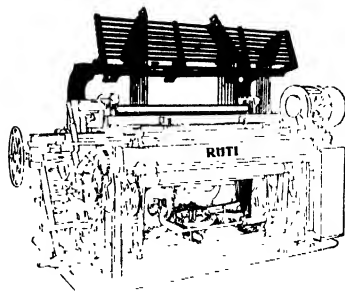
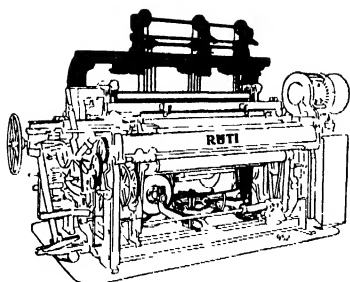
SPUN RAYON AND COTTON

During the course of a talk which he gave to the Annual Convention of the National Association of Cotton Manufacturers, Mr. Alexis Sommaripa, Manager, Fabric Development, E.I. du Pont de Nemours & Co., New York City, stated the following :—

'This "battle of textiles" is a peculiar one. We fight hard, but no one gets hurt and, according to Maurice Crawford, in the long run all fibres have grown merrily together. It is only the question of each one finding its best field of usefulness. There were great fears in the old days that cotton was to displace wool and in fact laws were passed to handicap the introduction of the new cotton fabrics. Now, some people fear that spun rayon will make inroads in cotton. *We are sure that twenty years hence, people in this country will see a large spun rayon industry alongside a greatly increased consumption of cotton.*

ROTARY TRAVERSE

The Universal Winding Co. of Manchester, in the course of recent experiments undertaken by them in connection with the principle of the rotary traverse have now arrived at a rotary traverse which they called the Reece roll, after the man who invented the design which made control and guiding of the thread completely successful. The advantage of the new roll lies in the fact that it is possible to increase the number of winds or helices on the drum, the secret being by perfecting the crossing points of the right-hand and left-hand threads, in order that the yarn would not change the direction of traverse except at the correct point.



The new Ruti loom with low frame, without any superstructure and with lateral suspension of the shafts, is an important improvement comparatively to the old system with the shadow casting. The view in the shed is now free and unobstructed ● both natural and artificial

illumination are improved ● also the control of the warp ● no more soiling of the warp and therefore spoiling of the cloth through oil splashes and dust ● the shafts are easier to deal with ● **The output is raised ● the goods are improved in appearance and quality.**

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When this object was achieved the limit of the possibilities of the rotary traverse was increased enormously. It now became possible to accelerate the spirals at the ends of the traverse whilst allowing them to be slower along the centre of the package. This ensured that perfect ends, in the case of cheeses, and base and nose in the case of cones, were formed, and the likelihood of dropped ends was entirely eliminated.

The advantages of the rotary traverse may not be immediately apparent, but they are nevertheless important. The first lies in the fact that it eliminates nine wearing points when compared with machines using reciprocating mechanism for traversing the yarn. These include cams, cam rolls, guides, and traverse bars. As these parts are subjected to more wear than any other on winding machines, the saving in maintenance costs are considerable. Secondly, the yarn receives gentler treatment from the rotary traverse; it is not roughened by any guide, and there is no possibility of drum cut yarn. Another advantage lies in the fact that, having no reciprocating mechanism, the machine is practically silent in operation. This imposes less fatigue on the operatives, and production efficiency is maintained throughout the shift.

Since its inception, the Reece roll has been applied in many ways and fresh applications are discovered as time goes on. Its most widespread application lies in winding cotton and worsted hosiery yarn into cones as a supply to knitting machines, but it is also used for winding warpers' cones. It is also used for winding packages for package dyeing,

both in cone and cheese form. The materials it winds are cotton, wool, worsted and jute.

The original length of traverse was 6 in., but in accordance with the needs of the textile industry other lengths of traverse have been evolved. Hence a 10 in. traverse and a 5 in. traverse have also been perfected. The 10 in. traverse cone and cheese have been developed for the jute industry, and a 20 lb. package can be wound, which is far in advance of anything before used in the industry.

In order to make the rotary traverse more universally acceptable, a traverse stop has been manufactured whereby the traverse may be shortened when using any of the standard lengths. For instance, with a 6 in. traverse, three crossing, half accelerated roll it is possible to obtain traverses of $1\frac{3}{8}$, $3\frac{5}{8}$, $4\frac{1}{4}$ and 6 in. This feature, as well as the Reece roll is the subject of patent applications.

The machines which incorporate the Reece roll are manufactured by the Universal Winding Co., Saville Street, Manchester 1, and they are known as the style 40, style 42, style 44 "Roto-coner." Further details may be had on application to the company.

RING SPINNING AND DOUBLING FRAMES

The sixtieth anniversary of the introduction of the Rabbeth spindle to the spinning trade of Lancashire is a fitting occasion on which to review the progress made by Howard & Bullough Ltd. in the development and perfection of their ring frame. The development of the ring frame may be said to date from the time Mr. F. J. Rabbeth, of Pawtucket, invented the spindle carrying his name. It was prominently brought before the British and Continental public by the Howard & Bullough ring frame exhibited at the Paris Exhibition in 1878.

The Rabbeth spindle was quite a new thing, for up to this invention all spindles were running with the footstep and middle bearing. Even its predecessor the Sawyer spindle, which was considered a success, was of this pattern. The advantages of a self-contained spindle with all its bearings enclosed as a single unit were that the spindle was lighter than any of its predecessors, less subject to vibration and less affected by bobbins that had lost their balance. These were characteristics which put this new spindle into a position of advantage over all its rivals.

The modern H. & B. spindle will permit a speed far in excess of the practical requirements of the trade, and being driven by a scientifically designed tape driving system, uniformity of twist is maintained. Improvements in the manufacture of rings from high grade steel, together with the more scientifically designed ring sections, have imparted qualities to this vital unit of the ring spinning system which permit the lightest traveller to rotate with ease when spinning fine yarn. The introduction of accurately machined cut gears ensures freedom from periodic motion of the parts, this being a most important contribution towards the solution of the problem of regularity in drafting.

The modern H. & B. ring frame has many other useful features such as rising and falling lappets, a device which assists materially in relieving the yarn of excessive spinning tension attendant upon the longer lifts now more generally adopted. High drafting may also be looked upon as a modern development, the great number of high drafting arrangements having been carefully investigated in order to arrive at the most successful system. The H. & B. single tape drafting arrangement has recently attracted the attention of the trade, and with the Casablancas system, may be considered as being very successful. The method of fibre control in the single tape drafting arrangement ensures regularity in drafting whilst the use of top rollers is a feature with which the operative is familiar. The H. & B. four roller arrangement is still a very popular system providing excellent drafting control whilst being the acme of simplicity. A large section of the fine spinning trade still retains the three roller arrangement although the H. & B. four roller system has recently been installed in fine spinning mills with distinct success.

Stop motions, measuring motions, traverse motions and bunching motions are among the many other devices which have been improved to meet the requirements of modern spinning, and more particularly have Howard & Bullough Ltd. developed the medium and fine spinning ring frames during the past few years.

In recent years motor driving has supplanted the belt drive in mills where first cost is not a primary consideration. Many variations of this type of drive have been applied to the H. & B. ring frame, varying from motor with a belt drive to direct coupled variable speed motor with remote control. In this latter type, the variation in speed is obtained by connections between the building motion and the motor.

The modern Howard & Bullough Ring Frame embodies the desirable characteristics of its predecessors plus improved design, based upon the experience of sixty years of ring spinning practice.

THE EFFECT OF TWIST ON THE STRENGTH AND LENGTH OF COTTON FIBRE.

By *HARIRAO NAVKAL, M.Sc., and Dr. NAZIR AHMAD, M.Sc., Ph.D., F.Inst.P.*

Published by the Indian Central Cotton Committee Technological Laboratory, Matunga, Bombay, Price 8 annas.

Five Indian cottons capable of spinning from 6's to 34's warp yarn were chosen, and in each case the fibre strength and the percentage contraction were measured with zero twist and after inserting 25, 50 and 100 turns both in the right-handed and left-handed directions. For strength tests, Barratt's apparatus, with certain modifications, was used, while the contraction was read on a micrometer in the eyepiece of a telescope. The mean humidity for each of these twists was kept nearly

constant, to avoid applying large corrections on this account. The following conclusions are derived from a consideration of the results :—

(1) The frequency distributions of the strength values are best represented by Pearson's Type I curve, whether the tests are made on whole fibres or centimetre lengths. When the fibres are twisted, the form of the curve is unaltered.

(2) If all the results are combined it is found that the effect of left-handed twist is slightly greater than that of right-handed twist.

(3) For Cambodia Co. 1, mean fibre-strength is unchanged up to 25 turns after which it increases by a small amount and then remains steady for higher twist. For the other cottons the fibre strength increases with twist from the outset, reaches a maximum value and then falls as the twist is gradually increased. But the rates of change of strength and the points at which the maximum values are reached are different for the different cottons. The maximum increase in strength for these cottons lies between 3 and 9 per cent. of the value at zero twist.

(4) Parabolic curves were fitted to the strength values and it was found that all cottons reach their maximum fibre strength only after some 40 turns per inch are inserted, and that the longer cottons could withstand a higher degree of twist than the shorter ones before reaching their maximum fibre strength, the peak value for Cambodia Co. 1 occurring at about 200 turns per inch.

(5) At 100 turns per cm. (254 turns per inch), there is a considerable fall in fibre strength, which is greater for the shorter than for the longer cottons. At this high twist, the shortest cotton, viz., A.19, lost as much as 24 per cent. of its fibre strength, while the longest, Cambodia Co. 1, lost practically nothing.

(6) Direction of twisting has no effect on the variability of fibre strength. Variation in fibre strength is very nearly constant up to 50 turns per cm., but at 100 turns per cm. it is significantly higher for all cottons except Cambodia Co. 1.

Furthermore this increase in strength variability at 100 turns is greater for the shorter than for the medium cottons. Thus, at high twists the fibres of these cottons are not only rendered weaker but also more variable in strength, and in both the cases the effects are greater with the shorter cottons.

(7) When twist is increased from zero to 25 or 50 turns per cm., the skewness of fibre strength distribution curve falls for some cottons and rises with others. The skewness at 100 turns, however, is significantly higher, being nearly twice the value for 50 turns for all cottons except Cambodia Co. 1.

(8) Direction of twist does not make any difference to the mean value of percentage contraction up to 50 turns per cm. At 100 turns, however, there is a tendency for the fibres to contract more with the right-handed than with the left-handed twist.

Stubbs

Patent

Quick Traverse Doubler Winder

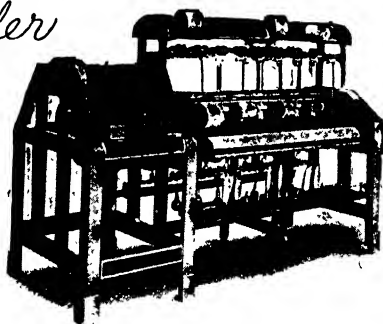
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Speeds of Drums and Cams can
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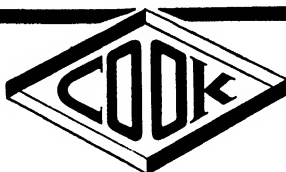
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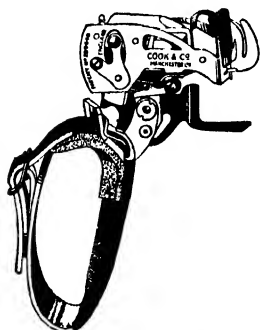
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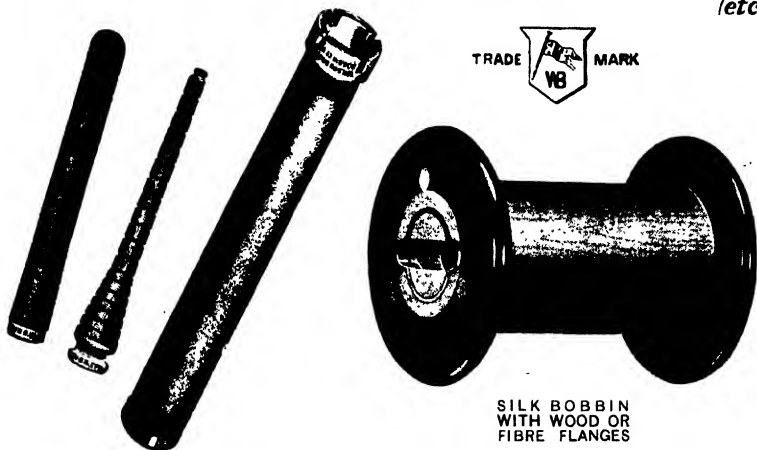


PATENT AUTOMATIC WEAVER'S KNOTTER

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(9) Fibres of all cottons contract on being twisted, the percentage contraction increases rapidly after medium twist (25 turns) is inserted and is greater for the shorter than for the longer cottons.

(10) Variability in length increases appreciably only after 50 turns are inserted and the increase is greater for the shorter than for the relatively longer cottons.

(11) The correlation coefficient between the strength and the percentage contraction of fibre is practically zero. Hence it is inferred that in many cases the fibre does not break at its thinnest point, which may in fact be rendered stronger, up to a limit, by the insertion of twist, but at a point where mechanical or bacterial injury has taken place.

(12) Variability in the properties of the cotton fibre with twist is discussed, and it is shown that so long as the twist is within the limits usually employed in spinning yarn, it improves, on the whole, the properties of the individual fibres. However, this improvement in fibre properties in general and in fibre strength in particular can account for only a very small fraction of the increase in yarn strength observed for the same range of twist.

(13) The bearing of these results on the molecular chain theory of the structure of cotton fibre is discussed, and it is found that this theory is capable of explaining, in a general way, the principal effects of twist on hair strength observed by us.

TECHNICAL NOTES

The following are extracts of articles appearing in the December, 1937, issue of *Melliand Textilberichte* :—

HIGH DRAFTING STAPLE FIBRE

The author of this article, E. Schmitt (*Melliand* 12, 947, 1937) has had considerable experience in spinning staple fibre, and it is his opinion that the draft of staple fibre on a ring frame can always be kept higher than in the case of cotton, chiefly because the staple is much more uniform. The experience of the author goes to show that a draft of 20 can be used by simply setting on the bobbins with leather apron high drafting systems when the roving is uniform. In the case of staple fibre, particular care must be taken to ensure constant atmospheric humidity and temperature in the spinning shed, because it reacts very strongly to fluctuations in these factors. The tension on the yarn must be kept as low as possible on the fly frame.

THE AUTOMATIC LOOM

R. Glafey, on the subject of the automatic loom, devotes attention to characteristic weft bobbin change motions described in the patent literature of Germany and other countries. It is shown how efforts have

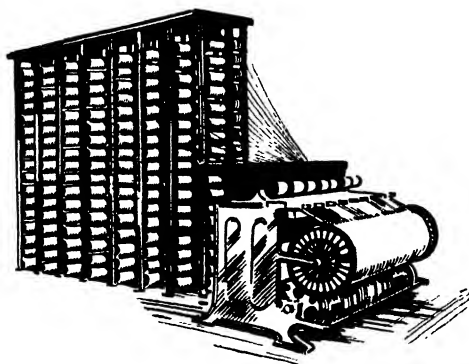
been made to raise the speed of the loom without detrimentally affecting the action of the mechanism. In conclusion, a description is given of the shuttle change motion.

ROLLER WEIGHTS AND TAKE-OFF TENSION

An article by Adolph Rossé describes the effect of the weight of the roller upon the take-off tension, and an effort is made to arrive at a formula for ascertaining the best weight. The take-off rollers used for warp beaming can never have a constant warp tension. The weight of the group of threads, the speed of revolution, and the roller weight are the three factors that determine the relative course of the yarn tension. The first decreases in the ratio of its square as the bobbin decreases in thickness, the speed of revolution increases linearly, and the roller weight remains constant. It is, however, possible by proper selection of the weight of the rollers, which remains constant, to provide for the most practical working tension. The following formula indicates how heavy the roller must be in order to ensure that the yarn tension at the end is equal to the yarn tension at the start, other conditions being equal :—

$$G = \frac{(r_2^2 - r_1^2) \pi h S r_1}{r_2 - r_1}$$

where G = weight of roller, r_1 = radius of empty roller, r_2 = radius of full roller, h = width of yarn wound on the roller, S = specific weight of yarn package.



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THE COTTON INDUSTRY OF ARGENTINA

The November-December, 1937, issue of *Platt's Bulletin* contains the following interesting information regarding the cotton industry in the Argentine Republic:—

Practically all the production of the mills is sold in the Argentine Republic itself, and taken as an average the counts spun are between 8's and 32's, although experimentally 60's counts from combed cotton has been spun. All the mills use the locally grown cotton. The characteristics of the yarn vary considerably, from those required for the manufacture of "Alpargatas" (canvas shoes much favoured by the working classes), cotton canvas, cotton duck for overalls, sheetings, etc., to soft spun yarn for the hosiery trade, which embraces yarn for knitted cotton meat bags in which the well-known Argentine Chilled Beef, Lamb and Mutton is exported abroad. The last decade has seen a great influx of cotton spindles into the Argentine Republic, especially of late years when a fillip has been given to the local industry by the fixing of high import duties on imported cotton yarns below 40's counts, beyond which counts the home mills cannot spin the Argentine cotton economically.

Most of the mills are new and equipped with the latest machinery, and it only remains for the cotton to be improved for the Argentine Republic to commence spinning higher counts, and so become practically self-supporting with regard to cotton manufactures. The class of labour is fairly good, rates of pay based on present exchange being somewhat similar to those received by English cotton operatives. At one time it was extremely difficult to obtain trained operatives and most of the mills have had to teach their workpeople.

According to a publication issued recently by the United States Dept. of Commerce, the principal cotton spinning and weaving mills in Buenos Aires, together with other mills in the Province of Buenos Aires, adopted a schedule of minimum wages, effective August 1, 1937. It is understood that there is still some reluctance on the part of certain establishments regarding the adoption of the proposed schedule, under which minimum wage rates for women will vary from 2.40 to 4 paper pesos for an 8-hour day and from 1.80 to 3 pesos for 6 hours, while minimum

wages for men will vary from 2 to 4.50 pesos per working day, which is either 6 or 8 hours. Most of the workers in the larger textile plants are on a piece-work basis, for which they receive higher rates of pay than the foregoing proposed flat daily rates. There is a somewhat complicated schedule for piece-work, the rates being calculated on the average earnings of a group. Women weavers are guaranteed an average of 4 paper pesos per day and men weavers an average of 5 pesos; however, the majority of the weavers are said to earn 30 to 50 per cent. more than the guaranteed minimum average. (These rates apply in the case of automatic looms.) Women spinners on piece-work are guaranteed an average of 3.50 pesos daily, although the average earnings are about 4 pesos. About 90 per cent. of the spinners and about one-half of the weavers in the cotton textile establishments are women. Most of the large Argentine textile mills work on a $5\frac{1}{2}$ day week (44-hour) basis. (*Note*: During recent months the exchange value of the Argentine peso has averaged about one shilling and fourpence in English money.)

THE BELGIAN COTTON INDUSTRY

The chief centres of the Belgian cotton industry are in the Flemish country, especially Ghent, Courtrai, Renaix, Deynze, Leuze, Lokeren, Ypres and Bruges. The greater part of the mills use American cotton, but over one-third of the raw material is Indian. The quantity of yarn produced is about 70,000 tons a year. Imports of yarn are comparatively unimportant, about 5,000 tons, generally finer qualities coming from England. A somewhat larger amount of mostly rougher yarn is exported to various manufacturing countries in Europe, but the bulk of the yarn is used for manufacture at home.

Of the cloth produced, only about one-third is absorbed in the home market, the rest being exported to a large variety of countries but mostly to the competitive markets of the Near and Far East and to South America. Exports to the Near East and North Africa have considerably diminished since the war, as a result of competition. Imports of finished cotton goods are, in comparison, unimportant; they amount to some 4,500 tons a year, a considerable part coming from Britain.

The difficulties of the times have forced many Belgian textile producers to adapt themselves rapidly to changed circumstances. Thus mills or factories often resort to the manufacture of wool or rayon when cotton or linen no longer produce the necessary minimum of profits. Especially in the Flemish centres various branches of textile manufacture are frequently operated in the same plant. Thus wool and rayon help cotton and linen to struggle on.

In this way the Belgian industry in general has been able to tide over hard times and during the last year or two achieve even a certain measure of prosperity. But it seems as though lean times might again be approaching, for during the last few months there has been a definite decline in most branches. Competition, even among European producers, is

exceedingly sharp, and the problem of keeping down cost of production is decisive.

It may, however, fairly be said that, precarious as the situation of the Belgian textile industry still is, it has perhaps stood the test better than the industries of several other countries. But real and permanent improvement can only be expected from a change for the better in the international conditions.

(*Manchester Guardian Commercial*)

COTTON TRADE CONTROL IN JAPAN

The following article appeared in a recent issue of the *Oriental Economist*.

On October 23, 1937, the Japanese Government made public their plan for regulating the cotton trade, roughly, as follows :—

For some time the import movement of raw cotton is to be restricted to 1,050,000 piculs a month and the production of cotton yarns reduced to about 300,000 bales a month, as against the past record of from 340,000 to 350,000 bales. Domestic consumption of cotton goods is to be curtailed in order that the past volume of yarn and piecegoods exports may be maintained despite this cut in production. Only when the export movement steps up, will imports of greater amounts of raw cotton be allowed.

If the restricted imports of raw cotton result in disturbed supply conditions and yarn prices at home are pushed up above world levels, that would hinder their export. As a counter-measure, therefore, maximum prices are to be fixed for yarns to check their appreciation, while raw cotton is subject to a control impost in order that its consumption may be held under check.

This control impost is to be equivalent to 10 per cent. *ad valorem*. This system will certainly boost the production cost of cotton goods to that extent, and hinder their export. To help eliminate this handicap, refunds are to be granted out of the raw cotton import control impost by way of encouraging cotton goods exports.

The maximum prices for cotton yarns and piecegoods made public on October 23 were as follows :—

230 yen per bale of "Gold Fish" 20s yarn ; delivery, January and February, 1938 ; basis, the closing quotation on the New York Cotton Exchange on December delivery at 8.3 cents ; a price change of 10 points to be equivalent to 1.50 yen per bale of yarns in Japan.

52 yen per picul of American raw cotton, strict middling grade with 7/8 inch staple ; delivery in January and February, 1938 ; basis, the closing quotation on the New York Cotton Exchange on December delivery at 8.3 cents ; a price change of 5 points to be equivalent to 25 sen per picul in Japan.

These maximum prices are to be determined by the Ministry of Commerce and Industry every Saturday and reported to the Japan Cotton

Spinners' Association and the Cotton Importers' Association before being made public. These prices are to be kept in line with the quotations on the New York Cotton Exchange by advancing or reducing, as the case may be, yarn and cotton prices by 1.50 yen per bale of yarn for every 10 points of fluctuation and by 25 sen per picul of raw cotton for every 5 points.

It will be an interesting study to see how this further intrenchment of cotton industry control, featured by a system of official maximum prices, is going to affect the earnings status of spinning companies and the export trade in cotton manufactures.

An offhand estimate of the spinner cost of production for 20s yarn is 200 yen per bale, leaving a margin of profit of nearly 30 yen against the maximum official price of 230 yen. As long as this margin of profit is obtainable, most spinning companies will not have any difficulty in earning sufficient to continue their dividend rates. It is estimated that to turn out a bale of 20s yarn, 350 kin of mixed cotton worth 175.17 yen is needed, plus direct labour of 25 yen, or 200.17 yen in all. This cost of cotton is arrived at as follows: On the basis of a picul of Akola-Khamgaon cotton costing 40.50 yen, mixed cotton suitable for spinning 20s is worth 45.50 yen per picul or 50.05 yen inclusive of a raw cotton control fee of 10 per cent. or 4.55 yen.

(EDITOR'S NOTE.—As a bale of 20s yarn contains 400 lbs., the quotation of 230 yen per bale given on the previous page would be equivalent to just over 8 pence per lb. One picul equals 60 kgs. or about 133½ lbs. At the present rate of exchange, the yen is roughly equivalent to one shilling and twopence.)

INSURANCE AGAINST LOOM STOPPAGES

A scheme of insurance against stoppages of mills and looms in the manufacturing section of the cotton industry has been prepared by a sub-committee of the English Cotton Spinners' and Manufacturers' Association and approved in principle by the Central Committee of that organisation, and has now been issued to the members of the affiliated local associations with a recommendation to give it favourable consideration. It bears the signatures of Sir John H. Grey, the chairman, and Mr. Thomas Ashurst, the secretary.

In essence the scheme provides machinery whereby compensation payments will be made to manufacturers who, owing to depression in trade, have looms stopped. This will diminish their incentive to accept orders below cost price to cover part of the overhead charges. If a manufacturer were assured that by stopping his looms he would not incur serious losses, he would not accept orders below cost and thereby not spoil the market for others.

The cost of the insurance contributions would be covered many times over by a relatively small increase in prices, to say nothing of the restoration of confidence and stable trade conditions which would inevitably follow.

The scheme is not to help inefficiency, and although it may seem to have little to offer to manufacturers who normally keep their mills fully running, it should be borne in mind that the scheme is devised to assist manufacturers to refuse to accept orders at prices below actual cost. It therefore follows that, if manufacturers in need of orders refuse to accept orders at less than actual producing cost, the result would be generally better prices all round, and the manufacturer who is usually fully engaged will receive the greatest benefit.

Membership in the scheme is to be open to all firms or persons operating looms weaving cotton or rayon cloths or mixture fabrics within the geographical area laid down in the Cotton Manufacturing Industry (Temporary Provisions) Act 1934. The scheme is to operate for not less than two years and three months, and before the end of that period a vote is to be taken on its continuance, legalisation, or abandonment. Compensation will not become payable until three months following the introduction of the scheme, which is to be administered by an insurance board consisting of a chairman and six other members appointed by the Cotton Spinners' and Manufacturers' Association, two appointed by the Federation of Master Cotton Spinners' Associations and two representing manufacturers who are not members of either organisation.

The officials to be appointed by the board are to have right of entry into mills of members to inspect equipment, books, and documents, to ensure that the provisions of the scheme are being properly observed. Firms are to submit particulars of the number of looms to be registered, each different width of loom and the individual loom numbers, and such other statistics and data as may be deemed necessary. The board will have power to reject applications in respect of any mill, and also in respect of looms which have been stopped continuously for a period of twelve months before the operation of the scheme or the date when the owner becomes a member. Contributions, to be paid quarterly in advance, are to be at the rate of one-tenth of a penny per inch per loom per week, with 25 per cent. more for check looms; but no contributions will be required when the mill is stopped on account of breakdowns, strikes, lockouts or fires, and no compensation paid in respect of such periods.

The compensation is to be at the rate of seven-tenths of a penny per inch of loom per week except for check looms, for which it will be 25 per cent. more. No payment is to be made for the first week's stoppage, and the compensation is to be limited in other ways; it must not exceed in any one year the amount which would be paid if 25 per cent. of the member's looms were stopped for a whole year; and it must not exceed the amount which would be payable in the event of 40 per cent. of the looms being stopped at any one time except in cases where the whole of the looms in a mill are stopped for a full week or more, when compensation of 60 per cent. of the total number of looms may be paid while the mill is stopped. The board, too, will be empowered to vary the rates of contribution and compensation by not more than 10 per cent., up or down, if necessary.

HOURS AND WAGES IN U.S. COTTON TEXTILE INDUSTRY DURING 1937

In an article appearing in the *Manufacturers' Record*, January, 1938, Dr. C. T. Murchison, President of the U.S. Cotton Textile Institute, states that the U.S. mills were able to meet the heavy demand in 1937 by lengthening the running time of their machinery. Active spindles at the peak of operations in 1937 averaged as high as 87 hours per week against an average per active spindle in 1936 of 77 hours, and in 1935 of 64 hours. The decline in spindles in place during 1937 occurred both in the cotton-growing states and in New England, although decline in the former was only 1 per cent. against 9 per cent. in New England states. In fact, in one southern state, Alabama, the number of spindles in place slightly increased.

Cotton mill wage rates in 1937 reached the highest level in the industry's history with the exception of the war years and a short period immediately thereafter. The 1937 average was 16 per cent. above that of 1936 and 13 per cent. above the rates prevailing during the N.R.A., according to data published by the U.S. Department of Labour. The present average of 42½c. an hour for the industry as a whole yields a weekly wage for the standard work week of 40 hours of \$17.00. In 1929, the average weekly wage amounted to \$15.56 for about 48 hours' work. Present living costs are about 12 per cent. under 1929. Consequently, the real wages of cotton mill workers at the present time, on the shorter 40-hour work week basis, would be about 20 per cent. above the 1929 earnings for the longer week prevailing at that time. As a result, however, of the slackening of production schedules during the last few months owing to greatly reduced demand for cotton goods, weekly earnings have, of course, been reduced proportionately, although the hourly wage rates have been maintained.

NEW SPINNING MILL IN AFGHANISTAN

According to the *Textile Weekly*, of Manchester, a cotton spinning mill is being erected in Afghanistan at Pul-i-Khomri, a place lying on the northern side of the Hindu Kush mountain. The site was chosen because of its natural advantages in various respects. It is in the middle of a cotton growing area, has sufficient water supply, and is also favourably situated in regard to communications.

KHADI PRODUCTION IN INDIA

A most interesting feature of the Indian piecegoods market at the moment, both for the Indian mills and importers, is the emphasis being laid on the use of khadi by Congress Governments. These Governments'

requirements of cloth for staff is being met by khadi, and in fact the use of the material is now under the direct patronage of the new Congress Governments. By khadi is meant cloth hand-woven from hand-spun yarn.

India consumes annually about 10,000,000 yards of khadi, worth approximately Rs.34,00,000. The total consumption of mill cloth is 4,200,000,000 yards. It is difficult to estimate exactly the number of hand-spinners and weavers, but on a rough computation about 229,200 find employment in the industry, of which 11,200 are weavers. The khadi industry received a strong impetus in 1920, soon after the non-co-operation movement was launched, when the wearing of the cloth was prescribed by the Congress, not with the definite view of developing an industry but as a symbol of discipline and self-sacrifice.

Five years later, the industry was established on definite lines. The All-India Spinners' Association was started in September, 1925, and was made distinct from the Indian National Congress. A sum of Rs.25,00,000 earmarked by the Congress for the production and sale of khadi was transferred to it. Since that year the association has been the driving force in the industry.

Different varieties of khadi are produced in different provinces. In some Indian States also an interest is taken in its manufacture. The quality and prices vary from province to province, depending on the skill of the worker and the quality of cotton at his disposal. The main factors that have impeded the progress of the khadi industry are the comparative dearness of hand-spun and hand-woven cloth and its uncertain quality. The exponents of khadi are, however, confident that with the application of modern methods, both the cost of production and the quality can be made competitive.

(Manchester Guardian Commercial)



COTTON TRADE STATISTICS

UNITED KINGDOM

Exports of cotton yarn from the United Kingdom for the year ending December 31, 1937, with previous figures for comparison :—

Countries of Destination	1935 lb.	1936 lb.	1937 lb.
British West Africa.. ..	1,475,100	1,912,300	2,338,700
British India—			
Bombay via Karachi	233,100	282,200	194,400
,, Other Ports	2,335,900	1,891,000	1,283,600
,, (Total)	2,569,000	2,173,200	1,478,000
Madras	3,895,900	2,996,300	3,497,200
Bengal, Assam, Bihar and Orissa	3,744,600	3,018,500	2,096,200
Burma	434,600	427,200	360,100
Total (British India)	10,644,100	8,615,200	7,431,500
Hong Kong.. ..	1,182,700	1,559,200	1,561,000
Australia	5,606,500	5,442,000	6,285,700
Canada	4,545,700	4,457,800	4,848,200
Other British Countries	8,534,700	10,310,500	10,518,400
Finland	937,400	1,197,800	1,538,500
Sweden	5,356,200	6,175,400	6,308,700
Norway	4,272,700	5,569,200	5,477,200
Denmark	3,563,300	4,375,600	3,712,700
Poland	1,984,700	2,583,600	2,539,100
Germany	30,258,300	32,716,900	29,396,000
Netherlands	15,192,300	18,266,100	23,684,800
Belgium	5,265,300	5,233,600	5,928,700
France	569,700	869,700	1,858,900
Switzerland	4,683,600	4,009,100	4,310,500
Italy	212,600	3,500	48,800
Austria	855,700	1,380,000	833,600
Czechoslovakia	1,239,100	857,800	1,525,200
Yugoslavia	2,842,100	2,644,100	1,823,200
Greece	823,700	896,100	831,600
Bulgaria	450,200	704,500	1,017,300
Roumania	4,026,600	6,769,500	8,513,500
Turkey	1,447,900	1,074,300	1,380,200
China	467,600	527,600	522,000
Japan	1,281,900	952,800	630,800
United States of America	1,855,400	1,613,400	1,305,800
Brazil	2,338,200	1,840,700	1,608,800
Argentine Republic	8,418,600	6,009,300	5,890,500
Other Foreign Countries	11,342,700	12,357,200	15,428,600
Counts { Up to 26's	—	—	48,875,600
*Over 26's up to 40's	81,454,200	91,355,400	44,590,400
Over 40's up to 80's	41,648,100	41,152,900	45,065,500
Over 80's up to 120's	16,249,200	16,248,400	17,987,100
Over 120's	2,323,100	2,168,100	2,579,900

* Prior to 1937, includes "up to 26's."

U.K. YARN EXPORTS—*continued.*

	1935 lb.	1936 lb.	1937 lb.
Grey, Unbleached	124,210,800	132,733,700	140,774,600
Bleached and Dyed—			
Mercerised	6,704,500	7,354,400	6,685,700
Not Mercerised	10,508,700	10,571,800	11,374,200
Over 120's	250,600	264,900	264,000

Exports of cotton cloth from the United Kingdom for the year ending December 31, 1937, with previous figures for comparison :—

Countries of Destination	1935 Sq. Yds. (in 1,000's)	1936 Sq. Yds. (in 1,000's)	1937 Sq. Yds. (in 1,000's)
Irish Free State	43,722	39,674	35,257
British West Africa	164,387	198,799	178,022
Union of South Africa	118,124	121,102	132,998
Southern Rhodesia	11,582	10,904	16,102
British East Africa	10,012	7,062	7,367
Anglo-Egyptian Sudan	3,334	2,618	2,007
Aden and Dependencies	3,703	3,597	4,191
British India—			
Bombay via Karachi	171,802	147,079	143,881
„ „ Other Ports	134,398	111,761	80,621
„ (Total)	306,200	258,840	224,502
Madras	56,439	36,014	30,901
Bengal, Assam, Bihar and Orissa	138,804	96,010	67,803
Burma	41,534	25,510	32,592
Total (British India)	542,977	416,374	355,798
British Malaya	29,575	34,189	51,999
Ceylon	29,008	31,909	27,629
Hong Kong	5,808	3,033	3,453
Australia	118,348	123,593	152,409
New Zealand	36,437	35,077	35,775
Canada	59,890	73,725	76,371
British West India Islands	34,937	30,524	29,453
British Guiana	6,941	6,275	4,928
Other British Countries	23,671	17,802	17,622
Finland	6,793	7,184	9,400
Latvia	3,040	3,752	4,407
Sweden	20,111	22,039	24,227
Norway	18,513	20,118	20,749
Denmark	46,450	52,558	49,548
Germany	21,852	34,045	31,210
Netherlands	20,494	23,338	30,306
Belgium	11,535	9,702	8,857
France	2,628	2,548	3,027
Switzerland	32,494	35,995	45,937
Portugal	3,621	3,120	2,629
Spain	515	293	214
Italy	2,250	445	2,352
Austria	3,886	3,422	2,617
Yugoslavia	4,637	3,652	2,383
Greece	27,451	25,348	17,123
Roumania	5,289	2,152	2,256
Turkey	14,734	11,622	15,394
Syria	5,579	4,528	4,201
Egypt	35,668	64,342	51,575
Spanish Ports in North Africa	1,931	267	607

U.K. CLOTH EXPORTS—*continued.*

Countries of Destination	1935 Sq. Yds. (in 1,000's)	1936 Sq. Yds. (in 1,000's)	1937 Sq. Yds. (in 1,000's)
Morocco	10,808	4,655	3,778
French West and Equatorial Africa	30,936	41,580	31,642
Belgian Congo	12,074	5,911	4,759
Portugese East Africa	7,243	6,896	7,912
Iraq	9,265	5,421	8,710
Iran	5,746	12,612	3,932
Dutch East Indies	10,308	27,192	60,268
Philippine Islands	2,763	2,933	3,374
Siam	3,267	1,660	1,365
China	8,425	4,725	4,223
Japan	1,380	1,098	864
United States of America	9,727	12,955	13,448
Cuba	9,101	12,327	16,732
Mexico	3,005	3,925	3,913
Colombia	40,454	61,132	62,634
Venezuela	23,961	22,556	23,330
Ecuador	2,547	1,815	1,577
Peru	7,151	10,709	6,307
Chile	16,854	13,344	9,873
Brazil	1,167	1,809	1,078
Uruguay	11,202	11,268	9,557
Argentine Republic	134,212	115,749	127,150
Other Foreign Countries	54,908	47,605	55,092
Grey, Unbleached	329,013	315,904	317,254
Bleached	611,262	602,180	572,777
Printed—			
Cretannes and Chintzes	5,787	6,870	6,646
Other Sorts	411,122	392,646	406,842
Dyed in the Piece—			
Pile Fabrics	3,348	2,787	3,258
Other Sorts	490,157	492,457	503,183
Manufactured of Dyed Yarn—			
Damasks, Tapestries, Brocades and the like	531	384	503
Other Sorts	97,211	103,376	111,455

RE-EXPORTS OF COTTON FROM THE UNITED KINGDOM

(Cotton Season 1936-37, Running bales.)

According to figures published by the Liverpool Cotton Association.

Countries	Total	Varieties					India
		Amer- ican	Peru	Egypt	Sudan	Other Africa	
Total ..	127,655	17,468	9,944	36,742	11,822	3,191	45,442
United States ..	31,931	4,462	505	15,362*	4,783	63	6,756
Belgium ..	9,849	2	1,597	454	25	419	7,350
Estonia ..	9,150	3,832	311	3,727	1,022	—	246
Finland ..	4,484	2,733	—	990	—	431	130
France ..	8,658	38	782	187	370	157	6,908
Germany ..	28,701	2,483	5,470	4,695	166	1,114	14,377
Netherlands ..	4,358	111	306	170	—	140	2,543
Latvia ..	1,708	1,063	—	240	65	334	6
Poland ..	6,852	105	207	663	822	10	5,045
Portugal ..	5,236	110	—	3,984	30	283	530
Sweden ..	1,287	175	6	335	27	100	644

* Including 4,633 bales of Sakel and 150 bales of other cotton.

IMPORTS OF COTTON YARNS AND PIECEGOODS INTO INDIA

Figures for the six months April 1 to September 30, 1937. (Prepared by His Majesty's Senior Trade Commissioner in India and published by the Department of Overseas Trade.)

COTTON YARNS

There was some reduction in the aggregate trade from 16 million lbs., value Rs.137 $\frac{3}{4}$ lakhs to 10 million lbs., value Rs.123 $\frac{1}{2}$ lakhs. The shares of the two principal countries of supply, United Kingdom and Japan, increased to a certain extent in value, although there was some reduction in quantity, owing to the almost complete elimination of China. The imports from the United Kingdom in the six months under review were 3·7 million lbs., value Rs.46 $\frac{3}{4}$ lakhs as against 4·1 million lbs., value Rs.40 $\frac{1}{2}$ lakhs in the corresponding period of 1936. The imports from Japan were 6·3 million lbs., value Rs.76 lakhs as against 8·9 million lbs., value Rs.72 lakhs in the corresponding period of the previous year.

GREY PIECEGOODS (PLAIN GREY)

There was a very considerable fall in the aggregate trade in these goods from 96 million yards, value Rs.112 lakhs to 27·6 million yards, value Rs.40 lakhs. The fall was almost entirely attributable to reduced imports from Japan, whose sendings declined from 90 million yards, value Rs.102 lakhs to 22 $\frac{3}{4}$ million yards, value Rs.31 $\frac{1}{2}$ lakhs. Arrivals from the United Kingdom registered a small reduction from 6·6 million yards, value Rs.9 $\frac{3}{4}$ lakhs to 4·9 million yards, value Rs.8 $\frac{1}{2}$ lakhs.

GREY PIECEGOODS (BORDERED GREY)

The aggregate trade in these goods also declined heavily from 53·8 million yards, value Rs.187 $\frac{1}{2}$ lakhs to 15·3 million yards, value Rs.65 $\frac{3}{4}$ lakhs. The reduction was shared by the two principal countries of supply, the arrivals from the United Kingdom declining from 23·4 million yards, value Rs.40 $\frac{1}{2}$ lakhs to 9 million yards, value Rs.17 $\frac{1}{2}$ lakhs, while shipments from Japan fell from 30·4 million yards, value Rs.35 lakhs to 6·3 million yards, value Rs.8 $\frac{1}{4}$ lakhs.

WHITE PIECEGOODS (BLEACHED)

There was a decline in the imports of these goods from 108·7 million yards, value Rs.215 lakhs to 89·2 million yards, value Rs.198 lakhs. Imports from the United Kingdom which constitute much the greatest share of the total imports declined from 79 million yards, value Rs.162 $\frac{1}{2}$ lakhs to 68·6 million yards, value Rs.151 $\frac{1}{2}$ lakhs. The imports from Japan also declined from 26·4 million yards, value Rs.39 $\frac{1}{2}$ lakhs to 16 million yards, value Rs.26 $\frac{1}{2}$ lakhs. On the other hand, the arrivals from Switzerland registered some increase from 2·3 million yards, value Rs.9·3 lakhs to 3·3 million yards, value Rs.14 $\frac{1}{2}$ lakhs.

PRINTED PIECEGOODS

There was a decline of more than 42 per cent. in the total yardage from 100 million yards, value Rs.153½ lakhs in 1936 to 58 million yards, value Rs.105 lakhs in the period under review. There was only a slight reduction in the arrivals from the United Kingdom, from 25 million yards, value Rs.55 lakhs to 24 million yards, value Rs. 52 lakhs. Shipments from Japan, however, declined by nearly 50 per cent. from 74.5 million yards, value Rs.98 lakhs to 33.3 million yards, value Rs. 51 lakhs.

DYED PIECEGOODS

There was a small reduction in the yardage but a slight increase in the total value of this trade in the period under review, from 42.7 million yards, value Rs.107 lakhs to 41.3 million yards, value Rs.116 lakhs. The arrivals from both the principal countries of supply shared in this increase, those from the United Kingdom advancing from 33.5 million yards, value Rs.88½ lakhs to 30.8 million yards, value Rs.92½ lakhs, while sendings from Japan advanced from 7.1 million yards, value Rs. 11½ lakhs to 7.8 million yards, value Rs.14.8 lakhs. The comparatively small share of Switzerland advanced from 1.5 million yards, value Rs.4.7 lakhs to 1.6 million yards, value Rs.5½ lakhs.

WOVEN COLOURED PIECEGOODS

There was a substantial reduction in quantity and a smaller reduction in the value of this trade in the six months ended September 30 as compared with the same period of the previous year, from 7 million yards, value Rs.18.7 lakhs to 4.3 million yards, value Rs.16.7 lakhs. The loss was suffered entirely by Japan, whose sendings declined in the period under review from 5 million yards, value Rs.11 lakhs to 2.2 million yards, value Rs.7½ lakhs. The arrivals from the United Kingdom remained almost stationary in quantity at 1.8 million yards but advanced in value from Rs.6.7 lakhs in the six months ended September last year to Rs.8.1 lakhs in the period under review.

FENTS

The total importation of Fents of all kinds, declined by more than 50 per cent. in the period under review, from 6.7 million lbs., value Rs.46½ lakhs to 2.9 million lbs., value Rs.20.3 lakhs. The decline in this trade was entirely attributable to reduced imports from Japan from 5½ million lbs., value Rs.39½ lakhs to 0.7 million lbs., value Rs.6 lakhs. The arrivals from the United Kingdom advanced from 0.8 million lbs., value Rs.5.3 lakhs to 1.3 million lbs., value Rs.9 lakhs and from the U.S.A. from 0.3 million lbs., value Rs. 1½ lakhs to 0.9 million lbs., value Rs.5 lakhs.

As regards categories, the importation of cotton fents, not exceeding 4 yards in length, declined in the period under review from 17 million yards, value Rs.20½ lakhs to 12.1 million yards, value Rs.18 lakhs. The imports of silk, artificial silk, silk mixture or artificial silk mixture, not exceeding 2½ yards in length, almost disappeared from 3.3 million lbs., value Rs.25.7 lakhs to 0.3 million lbs., value Rs.1.9 lakhs.

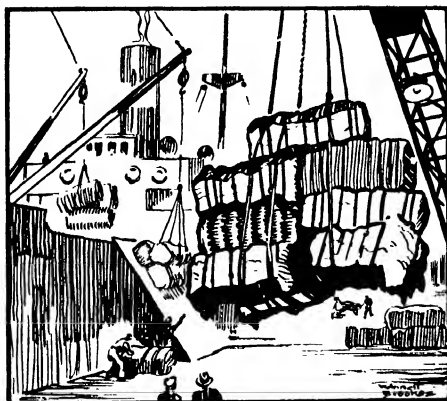
COTTON SEWING THREAD

There was an appreciable decline in the total imports from 1·2 million lbs., value Rs.27½ lakhs to 0·8 million lbs., value Rs.22½ lakhs. The United Kingdom as the principal supplier suffered the heaviest decline, her sendings falling from 0·9 million lbs., value Rs.21¼ lakhs to 0·6 million lbs., value Rs.18 lakhs.

PRODUCTION OF COTTON YARN AND PIECEGOODS IN JAPAN

Year and Month	Cotton Yarn† bales	Cotton textile*		Silk-Cotton Mixed Textiles*		Cotton† Piece- goods 1,000 sq. yds.
		Broad Width metre	Narrow Width piece	Broad Width metre	Narrow Width piece	
1934	3,472,442	3,689,072,817	110,016,164	3,916,253	857,141	1,793,845
1935	3,560,724	3,811,718,163	113,034,685	4,278,844	1,866,844	1,843,469
1936 September ..	290,434	304,609,657	8,564,776	326,410	242,748	143,519
October ..	298,387	304,429,887	8,686,965	368,024	292,632	145,129
November ..	318,427	319,943,087	8,321,876	373,752	281,947	154,601
December ..	326,639	317,274,426	8,817,939	435,432	299,539	157,730
1937 January ..	326,126	296,595,348	8,870,165	435,001	224,286	154,463
February ..	329,822	293,290,597	7,953,186	410,285	162,146	159,417
March ..	325,890	301,808,430	9,783,624	415,178	221,784	157,384
April ..	337,804	314,141,013	10,002,400	365,709	219,420	160,513
May ..	334,942	324,792,349	10,037,942	366,836	160,043	160,233
June ..	341,461	327,818,710	9,131,866	457,504	146,811	160,806
July ..	338,387	325,317,292	8,364,271	508,220	160,135	157,441
August ..	339,796	316,405,902	7,135,889	243,029	84,695	156,247
September ..	349,846	318,141,909	8,463,630	369,571	203,552	159,416
Jan. to 1937 ..	3,024,071	2,821,761,450	79,744,606	3,591,533	1,585,872	1,425,980
Sep. 1936 ..	2,663,989	2,677,288,369	86,628,211	3,104,137	1,612,897	1,341,932

* Department of Commerce and Industry. † Japan Cotton Spinners' Association.



MISCELLANEOUS

EQUIPMENT AND ORGANISATION OF THE ARTIFICIAL FIBRE INDUSTRY IN ITALY

The rise and growth of a powerful artificial fibre industry in Italy has been favoured not only by the low percentage of total costs accounted for by the raw materials used by an industry in which processing costs are by far the largest factor, but also by special conditions such as the abundant supply of electric power as well as of many of the accessory materials required. But if Italy has been able to win the right to rank as Europe's largest producer and the world's largest exporter, this is due above all to the enterprise of her manufacturers, the skill of her technicians, and the presence of a large body of workers traditionally specialised in the kindred processes of silk reeling and manufacturing.

As already stated a further stimulus to the growth of the artificial fibre industry in Italy has been given by the recent policy which aims at strengthening and encouraging national industries; in this special branch of activity this policy has led to the enlargement of the factories, organisation for the production of many of the accessory materials required, and the building of much of the machinery. Moreover, in the last few years, studies have been made and enterprises started with a view to obtaining cellulose of the fine quality called for in the manufacture of rayon from Italian raw materials, and the day is not far off when the needs of the industry will thus be met to an ever increasing extent.

There are now fifty plants in Italy devoted to the manufacture of artificial fibres and carrying on the further processing of the yarns, such as reeling, spooling, winding, throwing, dyeing, etc. These works are equipped with more than 145,000 spinning tubes and some 700,000 throwing spindles; they employ over 28,000 workers.

Taking into account the subsequent manufacturing activities, over 150,000 workers are now engaged in Italy in the production and processing of artificial fibres (spinning, weaving and accessory manufacturing industries). This figure clearly shows the importance of this industry to the business life of the country.

OUTPUT OF ARTIFICIAL TEXTILE FIBRES (Rayon and Staple Fibre)

Year	Output m. tons		Italian percentage of world output
	World	Italy	
1932	247,000	24,755	10.0%
1933	316,000	37,500	11.9%
1934	372,000	48,500	13.0%
1935	493,580	74,800	15.1%
1936	565,000	90,000	15.9%
1937 (estimate)	750,000	120,000	16.0%

(The Italian Exporter)

COTTON v. STAPLE FIBRE IN U.S.A.

In an interesting article in a recent issue of the *Texas Business Review*, Dr. A. B. Cox, the well-known Southern economist makes the following statement :—

It would be a very bad mistake to assume that competing textiles and other products will not be substituted to a considerable extent for cotton goods if the price of cotton goods is artificially raised. A very large share of the great volume of purchases of cotton goods is attributable to the relatively low price of the goods, and as surely as the price is raised those purchases will decline relatively.

It is not necessary, however, to guess concerning the effect of the processing tax on cotton consumption in the United States as we have had over two years of experience with it. During 1932-33, the last year before the processing tax came into existence, the United States consumed 6,000,000 bales of cotton. During the first year of the processing tax our consumption was reduced to about 5,500,000 bales, and during the second year to 5,200,000 bales. The first year after the tax was removed, consumption rose immediately to 6,200,000 bales.

The most aggressive competitor of cotton consumption in the United States is synthetic fibre. Does it mean anything to those who would attempt to solve the problems of cotton growers by a processing tax on cotton to know that from 1932 to 1933, the year the processing tax was introduced, that rayon and staple fibre production increased in the United States nearly 80,000,000 lb., equivalent to about 180,000 bales of cotton; and that production in the United States this year seems destined to exceed 300,000,000 lb? Does it mean anything to say that rayon staple fibre prices have been reduced from about forty cents per lb. in 1933 to twenty-five cents in 1937? Is it significant that tyre manufacturers can make better tyres out of rayon than cotton, or that better sails for ships can be made of rayon than of either cotton or linen, and that the change from one to the other is a matter of price?

Certainly, if the cotton growers were entitled to adjusted compensation in 1933, and they were, they are in double need of it now in view of the loss of foreign markets. The big question is: Is it wise or safe to attempt to levy tribute on cotton growers' domestic market, especially with a processing tax?

The processing tax is an unsound method of taxation: (1) Because of the necessity of pyramiding costs the consumer will pay far more than can ever be collected and returned to the cotton growers; (2) the tax will fall heaviest on the poorest people because they buy the coarse heavy goods made of the poorest quality cotton; (3) it will subsidise competing products; and (4) it will not only reduce the demand for cotton, but it will be cumulative, and lack of demand is the foundation of the cotton problem. Is it possible for the solution of such a fundamental problem to come out of such iniquities?

CLOTH IN CAR MANUFACTURE

Figures recently available regarding purchases made by Ford Works, Dagenham, England, during 1937, show that 567,900 yards of body cloth, cotton head-lining, and similar material were bought for use in the upholstery and interior trimming of Ford cars—equal to over 320 miles of material 60 inches wide.

The whole of this material was bought from mills in Lancashire and Yorkshire.

Cloth is used for the interior finishing of Ford cars to a large extent, and those engaged in the industry will have noticed that the company regards this fact as one of considerable importance, due prominence being given to it in its publicity. It is significant that, despite the claims made for rival materials, fabrics continue to be preferred by many purchasers of expensive cars, because of their comfort and attractive appearance.

COTTON FOR AVIATION PURPOSES

The United States Department of Agriculture is doing all it can to increase the use of cotton materials in road-surfacing. In addition, influence is being brought to bear on the Bureau of Air Commerce to promote the use of cotton cloth in the construction of airport runways. At least two airports have used cotton materials in runway building and arrangements are in hand to supply cotton materials free of charge to sponsors of airport projects up to a limit of 10,000 dollars. Laboratory technicians of the Bureau are experimenting with cotton to determine other uses in aviation.

THE PRESENT POSITION OF THE WORLD'S COTTON TRADE

The following extract from *The Economist*, November 27, 1937, was included in a special report issued a few weeks ago by Messrs. Reiss Bros. of Liverpool :—

The prices of many primary products have rapidly and persistently declined since last March. No leading commodity, however, has suffered so severe a fall in price as raw cotton. What are the causes and the implications of this collapse? To find an answer, we may first examine the trend of the world's cotton consumption during the past eight years. Naturally, the intake of the raw material by the world's cotton mills declined during the late depression, but the reduction in demand was surprisingly small. Mill consumption fell from 11,731 million lbs.

during the season ended July 1930, to 10,433 millions during the subsequent season. During 1931-32 consumption rose again slightly to 10,449 million lbs. and the improvement has continued ever since. In 1936-37, for example, the world's mill consumption of 13,944 million lbs. showed an increase of no less than 19 per cent. over the figure for 1929-30. In view of the simultaneous expansion of the rayon industry, this increase in the demand for raw cotton is unexpected and significant.

Consumption has risen in most countries, the improvement having been particularly marked in Japan and the United States. The marked increase in consumption in Japan, China, India, Brazil, Canada, and many smaller countries which have extended their cotton textile industries in recent years, goes far to explain the fall in Britain's textile exports. In 1936-37, indeed, mill consumption in China and India was not much smaller than in Greater Britain.

The figures, as a whole, show beyond all doubt that the collapse of cotton prices cannot be due to a failure of demand; for consumption, after only a moderate setback in the great depression increased, and apparently is still increasing. Our search for causes, therefore, must needs pass over to the supply side of the equation. The world's supply of raw cotton, like that of many other crops, is insusceptible of rapid adjustment, owing to human inability to control meteorological conditions and, consequently, yields per acre. Any change in the area planted may be offset by a contrary change in yield. The decline in prices after 1929-30 was followed by a steady reduction in the area under cotton between 1930-31 and 1933-34. The world's harvest in 1931-32, nevertheless, exceeded that of 1929-30 by a substantial margin. Although consumption had by that time taken an upward turn, the 1931-32 crop was too big to prevent a further fall of prices. The aggregate of "visible supplies" and stocks at mills continued to increase until the end of the 1932-33 season. At that critical juncture, the American Government intervened. Having a laudable desire to raise domestic cotton prices, they decided to limit the crop and to compensate American cotton growers by means of subsidies. Actually, the area harvested in the United States declined from 38.7 million acres in 1931-32 to 26.9 million acres in 1934-35. A substantial part of this decline, however, was offset by an increase in the area under cotton in other countries, stimulated by a rise in prices. Thus, although America's area under cotton was reduced by 11.8 millions between 1931-32 and 1934-35, the area under cotton in the world as a whole, according to the Imperial Economic Committee, fell by only 4.6 million acres. Thereafter, the area under cotton throughout the world began once more to increase, and in 1936-37 it was actually greater than in 1929-30. Figures for the current crop year, 1937-38, are not yet available, but provisional estimates suggest that a further increase of the area under cotton is more than probable.

This brief historical survey affords strong presumptive evidence that the seeds of the cotton growers' present troubles were sown several years ago, when the American Government took steps to increase domestic and, indirectly, world cotton prices. If the average yield per acre had remained substantially unchanged between 1929-30 and 1934-35, in-

creased supplies due to an extended acreage might have been absorbed by the rapid expansion of demand. However, the yield per acre has markedly increased since 1935-36. Consequently, the world's production was far greater last season than in 1929-30, although the acreage was only slightly higher. In the present season, 1937-38, it is clear that the yield per acre has shown a further and phenomenal increase, and supplies have been raised to a total with which demand cannot possibly cope, however much the price of cotton may be reduced. The remarkable increase in production this season has been due, in the main, to a record yield in the United States, but the harvests of Brazil, China, Russia and Egypt have also increased substantially.

Obituary

Mr. HAROLD CLIFF, J.P.

It is with deep regret that we have to record the death of Mr. Harold Cliff, J.P., Secretary for many years of the Oldham Master Cotton Spinners' Association, which took place in December last. Mr. Cliff, whose endearing personality and wide knowledge of the Lancashire cotton industry had made him known and respected by everyone connected with the trade, was a familiar figure at most of the International Cotton Congresses held in past years. He will be greatly missed as much by his friends from Continental countries as by his English colleagues. We tender our sincere sympathy to Mrs. Cliff and family in their great sorrow.

Reviews on Current Cotton Literature

"NEW YORK COTTON EXCHANGE YEAR BOOK, 1937." The Cotton Year Book of the New York Cotton Exchange for the year 1937, prepared under the direction of Mr. Alston W. Garside, Economist of the Exchange, has recently come to hand and contains comprehensive statistics on world supply and world distribution of American and other growths of cotton, prices of cotton, yarn and cloth, mill activity, and other information of interest from a cotton market standpoint.

World production of cotton during the season of 1936-37 reached the extraordinary total of 30,700,000 bales, according to statistics in the book. This total consisted of 12,375,000 bales produced in the United States and 18,325,000 produced in other countries. Thus, the United States contributed 40 per cent. and other countries 60 per cent. to the world total.

"THE EGYPTIAN COTTON YEAR BOOK, 1936-37." Price, P.T.50 in Egypt; 10s. post free to other countries.

Our readers will be sorry to learn that the very able editor of this annual publication, Mr. George Pilavachi, died soon after completing the latest addition.

The usual comprehensive statistics are given concerning production and distribution of Egyptian cotton. Many interesting articles form a prominent feature of the book. In his summary of the prospects of Egyptian cotton for the 1937-38 season, the editor stated:—

"We firmly believe that Egyptian cotton has been sold in the past five seasons at much below its real or intrinsic value, and that the consumer would be quite as ready to pay, without complaining, an even higher parity than what prevails at present. And in view of the fact that the record American crop will have to be sold at a very cheap price in order to regain the markets which were lost to this cotton owing to the paternalism of the past, Egyptian cotton should still continue to enjoy the favour of its regular customers not only because the improved economic conditions all over the world are reflected in a demand for quality goods, but also because the trend is towards finer counts and spinning, in which department of the trade we still hold a marked advantage over our competitors."

"THE BRITISH AND DOMINION TEXTILE INDUSTRY" (excluding Lancashire and Yorkshire). 48th edition, 1938. Printed and published by John Worrall Ltd., Oldham. Price 12s. 6d. post free. Abroad 14s. 6d. net. Also available in Pocket Edition, for the convenience of travellers and salesman, price 10s. 6d. post free. Abroad 12s. 6d.

The forty-eighth edition of this well-known directory fully maintains the standard set by its predecessors. It covers the Hosiery, Lace and Kindred Trades in the United Kingdom (exclusive of Lancashire and

Yorkshire, for which separate editions are published), Irish Free State, and the Dominions of Australia, Canada, New Zealand and Tasmania, and contains details of the spinners, manufacturers, bleachers, dyers and finishers of silk, rayon, cotton, wool, linen, flax, hemp and jute and all branches of the industry using power.

"INSTRUCTIONS FOR THE CULTIVATION OF COTTON," by R. Cruz Martins, Chief of the Cotton Scientific Service of the State of Sao Paulo, Brazil. Issued by the Instituto Agronomico de Campinas.

The book, which is published in Portuguese, deals with problems encountered in the cultivation of cotton, such as the choice and preparation of land, period of planting, choice of variety, manner of planting, spacing of rows, chopping out, pests (including the pink boll-worm and army worm), picking, etc. Information is also given on the sale of seed, etc.

"THE EMPIRE COTTON GROWING REVIEW." Published quarterly by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1, for the Empire Cotton Growing Corporation. Annual subscription 5s. post free.

The January, 1938, issue of the Review contains several interesting features, prominent amongst which are :—

"Soil Erosion : The Growth of the Desert in Africa and Elsewhere," by Sir Daniel Hall.

"Recent Research in Uganda on Blackarm Disease," by C. G. Hansford and H. R. Hosking.

"New Sakel Strains in the Anglo-Egyptian Sudan," by A. R. Lambert.

"The Effect of Visible, Ultra-violet and Infra-red Radiations upon the Germination and the Therapeutic Treatment of Cotton Seed," by B. N. Singh and R. S. Choudhri.

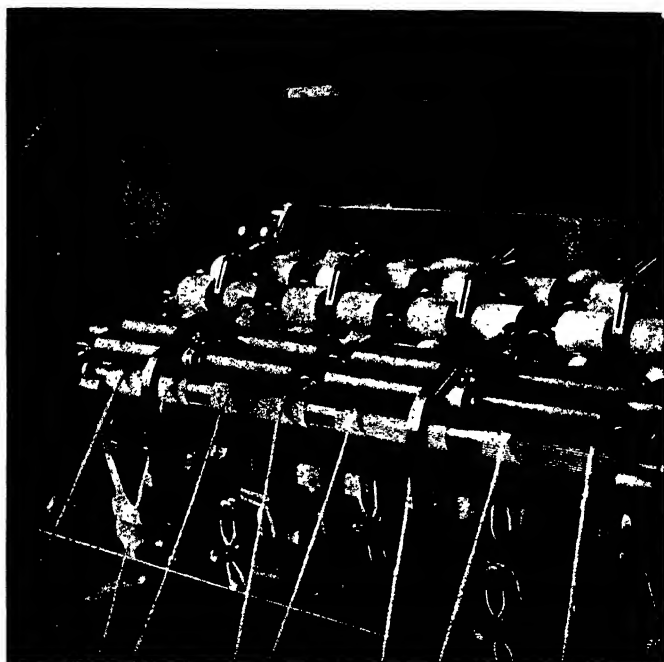
"THE WEAVER'S WAGE," by E. M. Gray. Published by the Manchester University Press.

This publication, which is the result of much careful and detailed study on the part of the author, is based upon the two wage censuses taken by the Weavers' Amalgamation in 1936 and 1937 and contains some striking comments upon the operation of the more looms system and automatic weaving. The author expresses doubt as to whether weavers on the new systems have a more arduous task than weavers on the ordinary system. He affirms that wages on the new systems are much better than those on the ordinary systems and states as an example that, whereas average earnings on the ordinary system are 39/10, those on the six-loom system are 46/8½, or 17 per cent. more, and those on the more-than-six-loom system 63/11½, or 60 per cent. more.

Particulars of wage earnings are quoted as being the actual earnings of operatives on various systems of working, but, if we may venture a mild criticism, scarcely sufficient prominence has been given to the fact that, in many cases, the figures represent the net amount taken home and do not take into account either the employers' or the workers' contributions to social service cost and, therefore, to get the true wages costs these should be added.

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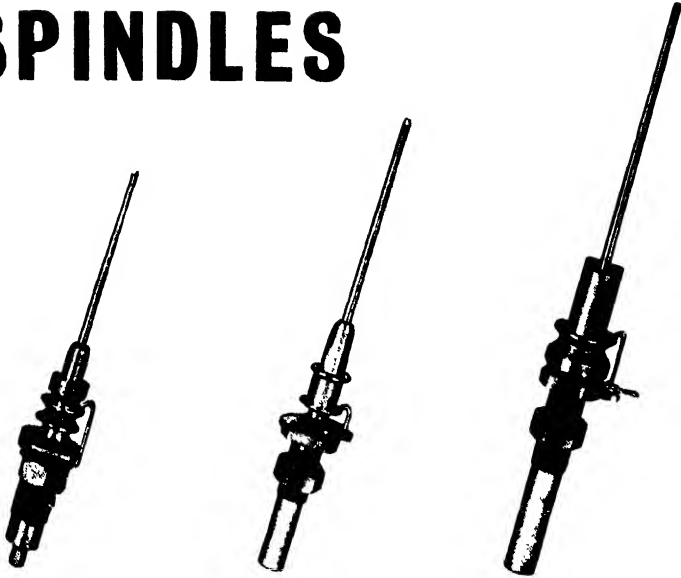
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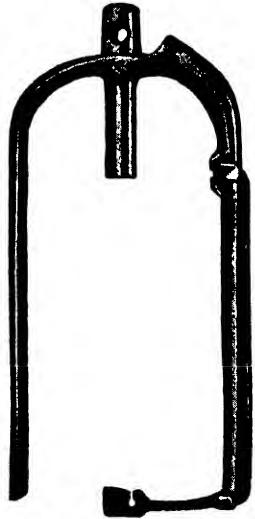
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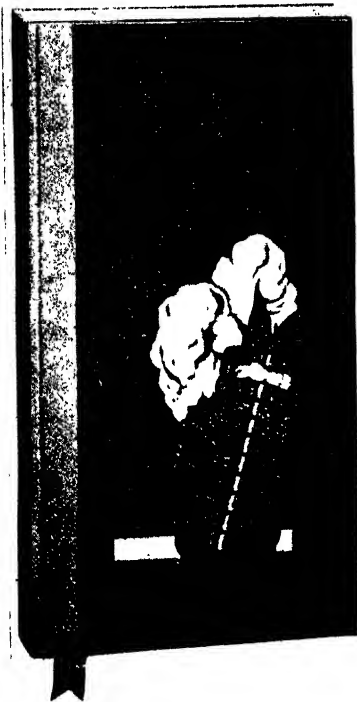
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(International Cotton Bulletin, No. 52)									

All other Congress Reports are out of print.

Other Publications.

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(VOL. XVI, No. 63)

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COMMITTEE'S COMMUNICATIONS

XVIII INTERNATIONAL COTTON CONGRESS CAIRO-ALEXANDRIA, 1938

The XVIII International Cotton Congress was held in Cairo and Alexandria from January 26 to February 3, 1938. A complete report of the verbatim proceedings at the business sessions of the Congress is being prepared. The report, which will also contain a list of all the delegates present and a complete set of all the papers presented to the Congress, will be published shortly, and a copy will be forwarded gratis to every member of the International Cotton Federation.* The book will be amply illustrated and will, it is hoped, constitute a book of reference for all time.

The resolutions adopted at the final sessions of the Congress in Alexandria, run as follows :—

(1) PROPAGANDA.

This Congress recommends to each affiliated association the formation of a special committee to undertake propaganda for all kinds of additional uses of cotton.

That national committees should further investigate the feasibility of replacing iron shod wheels of animal drawn vehicles by pneumatic tyres, and it should for this purpose collaborate with tyre manufacturers and road construction authorities of their respective countries.

This Congress therefore requests the Egyptian Government to encourage propaganda for extending the use of Egyptian cotton, the effects of which would be to the ultimate advantage of spinners and growers of Egyptian cotton.

* Copies will be available to non-members at a cost of 15/- each.

The General Secretary will act as a liaison officer between the national committees, and the latter are requested to report periodically on their activities and progress made to the Head Office of the International Cotton Federation.

(2) FALSE PACKING OF AMERICAN COTTON.

Resolved that this Congress wishes to place on record its high appreciation of the action taken by the Secretary of Agriculture of the United States of America in sending a technical expert to investigate the question of false packing in American cotton bales which still continues. It is hoped that sufficient evidence has now been collected to substantiate spinners' complaints in this direction and that the U.S. Federal Government or the Governments of those states exporting cotton will institute legislation that will put an end to this practice.

(3) DAMP IN AMERICAN COTTON.

That this Congress wishes to draw the attention of cotton planters and ginneries to the exceedingly damp American cotton delivered to spinners during the present cotton season brought about by the lack of sufficient warehouses accommodation for seed cotton at ginneries. Unfortunately this seed cotton was ginned in a damp condition resulting in gin cut nappy and kerosene impregnated cotton.

It is obvious that this excess moisture is a direct financial loss both to the spinner and the merchant but, furthermore, attention is directed to the fact that gin cut and nappy cotton is very "wasty" in the mill, and that cotton containing kerosene will not take dyes in the finishing processes and such cotton must of necessity be rejected.

(4) AIR CUT BALES.

That this Congress views with concern the growing prevalence of air cut bales emanating chiefly from South Brazil and U.S.A. ; these being caused by too rapid pressing of bales in conjunction with higher densities. These air cut bales are a serious loss and trouble to spinners as untold millions of fibres in such bales are cut and rendered useless. This Congress requests that all concerned should take steps to end a practice which is bringing otherwise good cotton into disrepute and suggests that experiments be undertaken by the Brazilian and U.S.A. Governments to discover a safe speed in pressing the bale.

(5) PRESENCE OF IRON STUDS IN EGYPTIAN COTTON.

With the object of eliminating damage to cotton spinning machinery due to the casual presence of iron studs used for fastening the hoops of country bales, this Congress expresses the hope that the Ginneries' Association in Egypt will experiment with a band or wire not dependent on loose studs for a fastening.



(6) FOREIGN FIBRES.

In view of frequent complaints from spinners of Egyptian cotton in regard to the presence of foreign fibres, whether of jute, teal or some other

material, this Congress urges the Egyptian Government to continue its efforts to eliminate these impurities and that the International Cotton Federation should ascertain through scientific institutions the exact nature of the fibres which give cause to this complaint. In the meantime this Congress recommends the more general use of containers at the side of each gin for the purpose of depositing any impurities picked out by the operative ; it is recommended that a bonus should be paid to the operative for each container filled with such impurities.

(7) COTTON GROWING FILM.

This Congress expresses its high appreciation of the film exhibited by the Extension Service of the Egyptian Ministry of Agriculture and ventures to suggest that a copy of the film should be forwarded for propaganda purposes to the headquarters of each Association of spinners and manufacturers which is affiliated to the International Cotton Federation.

(8) FUTURE MARKETS.

Realising the necessity for the existence of cotton futures markets in the interests of the cotton industry of the world, this Congress, whilst deprecating their use as a means of gambling, is of opinion that the laws of certain countries governing these markets should be revised in such a manner as to avoid unscrupulous debtors availing themselves of same, with a view to escaping liabilities incurred under a futures contract.

(9) UNIFORM METHOD OF TESTING COTTON FOR MOISTURE.

Resolutions of the Sub-Committee appointed to consider a Uniform Method of Testing Cotton for Moisture.

(a) NUMBER OF BALES IN SHIPMENT TO BE SAMPLED.

That from each shipment not less than 10 per cent. should be sampled, e.g., from 25 bales, 3 bales should be sampled.

(b) SAMPLES TO BE DRAWN BY AN OFFICIAL OF THE TESTING HOUSE.

That samples must be drawn by a representative of an officially recognised Testing House or a person duly authorised and sworn by such a testing house.

(c) TIME OF SAMPLING.

That samples should be drawn no later than one week after the arrival of the shipment at the mill.

(It will be seen that the above does not preclude the test being taken at an earlier date en route as in the case of Egyptian cotton at the Alexandria Testing House.)

(d) WEIGHING OF THE BALE TO BE SAMPLED.

It must furthermore be recognised to be very important that the weight of each bale sampled must be obtained at the time of sampling and that the

certified weight should appear upon the certificate of test. The numbers of hoops also to be certified. Damaged bales must not be sampled.

(e) *SIZE OF SAMPLE.*

That the size of the sample to be drawn should be 400 to 600 grammes and, furthermore, it is essential to protect the samples from exchanges of moisture with the atmosphere when being drawn. For this reason the cotton sample should not be adjusted to any particular weight but should be weighed in the unopened container.

(f) *SAMPLING.*

That attention should be directed to the importance of compounding the sample taken from any one bale in such a way that the whole mass of the bale is fairly represented, at least three layers equally spaced being sampled.

Excepting in the case that an approved mechanical sampler be used all the bands or ties must be removed from the bale before the samples are drawn.

The only type of mechanical sampler at present approved is that now in use at the Milan Testing House.

(g) *POSTING OF TEST CERTIFICATES.*

That the result of any test shall be sent by the Testing House direct both to buyer and seller.

(h) *DRYING OF SAMPLES.*

The Committee is of the opinion that the drying temperature should be 105–110° C.

Exceptionally in regard to the type of ovens used by the Alexandria Testing House in view of the test shown on page 44 of the Alexandria Testing House General Report for 1937, the drying temperature for that Testing House shall be approved up to 120° C.

(i) *METHOD OF CALCULATION.*

The basis of Calculation is that the dry weight is represented by 100 and the moisture content is expressed as a percentage of that dry weight. This percentage of moisture content is the "regain" of the cotton.

(j) *UNIFORM TESTING HOUSE CERTIFICATE.*

It is desirable that testing houses should as far as possible adopt a uniform test certificate and with that object in view the General Secretary be instructed to circulate copies of the various test certificates among the testing houses for their comments and that at the next Cotton Congress the Sub-Committee should formulate, issue and recommend the adoption by all testing houses a uniform moisture test certificate.

(10) *STANDARDISATION OF TESTING METHODS.*

When establishing standard testing methods for the textile industry the International Standards Association is requested to pay attention to the necessity for keeping the cost of these methods commensurate with the relative importance of the results.

It was also decided at a meeting of both the Spinner and Egyptian Sections of the Joint Egyptian Cotton Committee held on February 4, after the termination of the Congress, that the existing Humidity Agreement in respect of Egyptian cotton, as adopted at the Paris Congress in 1931, and renewed at various Congresses from time to time, should remain in force until *fourteen days after the meeting of the Joint Egyptian Cotton Committee to be held in Berlin on July 29, 1938*. This decision was the outcome of an exhaustive discussion at the Congress sessions, during which many unsuccessful attempts were made to formulate a new agreement.

The spinner members opened the proceedings by submitting the resolution they had put before the full meeting of the Joint Egyptian Cotton Committee held at Sils-Maria in July, 1936 (see "International Cotton Bulletin" No. 57, October, 1936), requesting that payments for excess moisture should be made retrospective back to 8.5 per cent. instead of 8.9 per cent., as contained in the present agreement. The Egyptian members rejected this proposal. The spinner members on the last day of the Congress put forward the following resolution :—

"In view of the fact that the exporters are unwilling to accept the conditions contained in the Sils-Maria proposition as from 31 August, 1939 (the spinners having previously consented to post-dating any agreement reached from 1938 to 1939), the spinner members of the Joint Egyptian Cotton Committee recommend all affiliated Associations to advise their members as from the date of the expiration of the existing Humidity Agreement (February 18, 1938), that they should buy Egyptian cotton only under conditions not less advantageous to themselves than those set out in the Sils-Maria resolution."

Immediately after the Congress representations were made by the Egyptian section to the spinners for another meeting to take place on the morning following the Congress. As a result of this meeting the following resolution was adopted by the spinners' representatives :—

"Without prejudice to the position taken up by the spinner members of the Joint Egyptian Cotton Committee upon the question of moisture in Egyptian cotton, we, the spinner members, in a spirit of goodwill, are agreeable to the request of the Egyptian members of the Joint Egyptian Cotton Committee to defer our decision of yesterday (February 3) until the next meeting of the full Joint Egyptian Cotton Committee to be held at Berlin in July next, and that the existing Humidity Agreement be extended to fourteen days after the date of such meeting."

The Egyptian members of the Committee accepted the above resolution and undertook to experiment in Egypt in an endeavour to find out the exact percentage of moisture in cotton from the field, through the various points, to Alexandria, which information is to be submitted to the next meeting of the Joint Egyptian Cotton Committee, to take place in Berlin on July 29.

Obituary

H.E. AHMED ABDEL WAHAB PASHA

All the members of the International Cotton Federation, and particularly the delegates to the XVIII International Cotton Congress held in Egypt earlier this year, will be extremely sorry to learn of the death of His Excellency Ahmed Abdel Wahab Pasha, which took place on April 16 last, following a short illness.



H.E. AHMED ABDEL WAHAB PASHA

His Excellency was the Vice-President of the Congress, and was also again appointed President of the Joint Egyptian Cotton Committee, a sub-committee of the International Cotton Federation, a position which he has held continuously in rotation with the spinners' president since the inception of the Committee in 1928.

A most capable official, he was for many years the mainstay of the Ministry of Finance, where he occupied during a long period, the position of Under Secretary of State. He had a sound and thorough knowledge of public finance in its many branches, and his background of solid financial knowledge and long experience constituted an adequate foundation for the important offices he was later to fill. He was Minister of Finance in the last Cabinet of Mohamed Tewfik Nessim Pasha, but when the Ministry resigned he left politics and accepted directorships of various companies.

The title of Bey, Second Class, was conferred on him in October, 1923, and the title of Bey, First Class, in March, 1925. The title of Pasha was conferred on him in October, 1930.

He will long be remembered by the members of the Joint Egyptian Cotton Committee, both spinners and exporters alike, for the able and impartial manner in which he presided over the deliberations of the Committee. Exceedingly quick to grasp the essentials of any question submitted to him, his ability to sum up discussions upon the various points before the Committee could not fail to impress his hearers, and his wise counsel and clear-sighted direction will be greatly missed by his colleagues on this Committee. Both at the business and social sessions of either Congress or Committee meetings, his charm of manner, ready wit and fluency of conversation in several tongues, endeared him to one and all and established him as an outstanding personality. The sympathy of all will go out to his wife and family in their great sorrow.

HERR ROBERT VON SZURDAY

It is with deep regret that we have to announce the death of Herr Robert von Szurday, co-President of the Hungarian Textile Association and Member for Hungary on the International Cotton Committee since 1925.

His quiet unassuming manner, coupled with his profound knowledge of all matters connected with the cotton industry, won for him the respect of his colleagues on the Committee, to whom his memory will always remain dear.

We extend our heartfelt sympathy to the members of his family and to the Hungarian Textile Association in the irreparable loss they have sustained.



BELGIUM.

The unfavourable conditions which became apparent towards the end of the year 1937 have become more pronounced. The weakness of the cotton market and the decline of business in general, has checked the sale of yarns and cloth. Deliveries of yarns are far from being satisfactory.

During the first quarter of this year, spinners have worked one day per week short time. This reduction in hours has not proved sufficient to bring about the desired liquidation of stocks, with the consequence that the Belgian Association of Cotton Spinners has decided further to curtail production in the cotton spinning mills to the extent of two days per week, from March 28th.

Wages have remained unchanged.

The following is the original report in French:—

Les tendances qui se manifestaient à la fin de l'année 1937 se sont accentuées.

La faiblesse des cours du coton et le marasme des affaires en général freinent les ventes de fils et de tissus.

Les livraisons de fils sont loin d'être satisfaisantes.

Pendant le premier trimestre, les filateurs ont chômé dans l'ensemble un jour par semaine.

Ce chômage n'étant pas suffisant pour résorber les stocks, l'Association Belge des Filateurs de Coton a décidé de faire chômer les filatures deux jours par semaine depuis le 28 mars.

Les salaires sont restés inchangés.

Association Belge des Filateurs de Coton, Gand.

CZECHO-SLOVAKIA.

During the first quarter of 1938, business has deteriorated both in the spinning and weaving sections of the cotton industry in Czecho-Slovakia. The output of the industry shows a reduction when compared with that of the beginning of the year. In addition to this, margins have shrunk considerably.

ENGLAND.

SPINNING SECTION.

The past quarter has been a difficult one for spinners, and the spinning branch like other sections has experienced a period of great depression.

Production has been curtailed to such an extent that the Egyptian section is working only at 60 per cent. capacity and the American section at 52 per cent. capacity.

The immediate prospects are of a disquieting character.

MANUFACTURING SECTION

Trade in the manufacturing section is at present unsatisfactory. Orders for cloth have been very few, particularly for the export trade, and in consequence a considerable proportion of the looms have been standing idle. The position has been further complicated by the inability of buyers to give delivery instructions for cloth made to contract, with the result that heavy stocks of cloth have accumulated.

There appears to be a complete lack of confidence amongst buyers, probably arising from the unsettled international situation.

Until confidence is restored and there is a liquidation of the stocks of cloth, there does not seem to be any likelihood of a material improvement in the situation, which has given rise to the gravest concern.

FRANCE.

The extremely precarious situation of the French cotton industry, which we pointed out in the last issue of the *International Cotton Bulletin*, became more pronounced during the first quarter of 1938.

A general movement of short time is actually being practised in the various cotton industrial districts varying from 4 hours per week (Alsace, Belfort, Normandy) to 8 hours per week (Vosges district and Nord), which equals from 10 to 20% of the French legal working week.

At the end of February, the latest month for which we have statistical returns, the percentage of activity of the mills, taking into account the mills totally stopped, was estimated to be about 78% for the spinning section and 82.3% for the weaving section.

At the end of the quarter under review, increases in wages varying between 4 and 8% were granted in different cotton industrial sections of the Nord, St. Quentin, Picardie, Vosges.

The original text in French runs as follows :—

La situation extrêmement précaire de l'industrie cotonnière française que nous signalions dans le dernier numéro du *Bulletin International Cotonnier* a continué à s'aggraver au cours du premier trimestre 1938.

Un short time généralisé est actuellement pratiqué dans les différentes régions cotonnières, variant de 4 heures par semaine (Alsace, Belfort, Normandie) à 8 heures par semaine (Région des Vosges, Nord), soit de 10 à 20% par rapport à la durée légale du travail en France.

A la fin de février—dernier mois dont les statistiques sont connues—le pourcentage d'activité des usines, compte tenu du short time pratiqué pendant ce mois et de l'outillage complètement arrêté, pouvait être évalué à 78% pour la filature et à 82,3% pour le tissage.

Au cours du trimestre en revue, des augmentations de salaires variant de 4 à 8% ont été accordées dans différentes régions cotonnières (Nord, Saint-Quentin, Picardie, Vosges).

STATE OF TRADE REPORTS

IMPORTATIONS ET EXPORTATIONS.

IMPORTS AND EXPORTS

						Années (Years)	
						1936	1937
						Quintaux	Métriques
						(In metric quintals)	
A—Importations : (Imports)							
1.	Fils de coton					6,822	18,519
	(Cotton Yarn)						
2.	Tissus de coton					9,920	16,189
	(Cotton Piecegoods)						
B—Exportations : (Exports)							
1.	Fils de coton : Exportations totales ..					61,442	71,454
	(Cotton Yarn—Total Exports)						
Destinations : (Countries of Destination)							
	Algérie, Colonies et Pays de Protectorat ..					22,806	22,919
	(Algeria, Colonies and Protectorates)						
	Marchés étrangers					38,636	48,535
	(Foreign markets)						
2.	Tissus de coton : Exportations totales ..					398,782	385,398
	(Cotton Piecegoods—Total Exports)						
Destinations : (Countries of Destination)							
	Algérie, Colonies et Pays de Protectorat ..					372,211	354,192
	(Algeria, Colonies and Protectorates)						
	Marchés étrangers					26,571	31,206
	(Foreign markets)						

(Syndicat Général de l'Industrie Cotonnière Française)

GERMANY.

SPINNING SECTION.

The business situation in the German cotton spinning industry has not altered to any important extent during the period covering the first quarter of 1938. The demand for yarns and the offtake in respect of running contracts still remained satisfactory.

The degree of occupation of spinning mills therefore remains about the same as previously reported.

The following is the original German report :—

In der geschäftlichen Lage der deutschen Baumwollspinnerei ist auch während des Verlaufes des 1. Quartals 1938 eine bemerkenswerte Änderung nicht eingetreten. Die Nachfrage nach Gespinnsten und ebenso der Abruf auf laufende Kontrakte blieb weiterhin befriedigend.

Der Beschäftigungsgrad der Firmen konnte daher auf dem früheren Stande gehalten werden.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

WEAVING SECTION.

The receipt of new orders remained satisfactory and the demand as far as running contracts are concerned was as active as heretofore.

The degree of occupation in the weaving mills has been further increased.

The following is the original report in German :—

Der Eingang an neuen Aufträgen blieb befriedigend. Auch war der Abruf auf laufende Kontrakte nach wie vor sehr lebhaft. Der Beschäftigungsgrad unserer Webereien hat sich weiter erhöht.

*(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei
der Fachgruppe Baumwollweberei)*

HOLLAND.

SPINNING

Conditions in the spinning section of the trade have not improved. There is less demand for yarns and many mills find it difficult to dispose of their production. Margins are also decreasing and altogether the prospects are not very favourable.

MANUFACTURING.

Employment in the weaving mills is slowly decreasing. There has been less demand for the home trade than might be expected, and for export, only few new orders can be booked. Deliveries for export during the last three months have been somewhat larger than last year, but most of these concerned shipments against orders booked previously. Stocks of cotton goods in many of the regular export markets seem to be much larger than last year, and it is therefore not very probable that conditions will improve before these stocks have been partly liquidated.

HUNGARY.

The state of the Hungarian cotton spinning and manufacturing industry has, in general, been unchanged during the period under review.

The following tabulation shows the principal figures for foreign trade :—

EXPORTS, 1937, IN QUINTALS.

Cotton yarn	192
Cotton piecegoods	15,480
(the greatest part was in printed goods)	

IMPORTS, 1937, IN QUINTALS.

Cotton, raw	264,112 (also waste)
Cotton yarn	11,889
Cotton piecegoods	7,031

(Magyar Textilgyárosok Országos Egyesülete)

ITALY.

The following are index numbers representing activity in the Italian cotton industry during recent years. The year 1928 is taken as the basic year, i.e., 100 :—

COTTON SPINNING												
Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec. Monthly Average
1936 ..	77,5	70,6	78,2	72,4	75 -	67,0	58,0	43,7	63 -	66,5	71,5	80,2
1937 ..	81,0	88,8	92 -	95,1	98,6	98,7	95,3	76,5	95,6	96,4	96,4	92,0
1938 ..	95,6	97,4										

COTTON MANUFACTURING												
Year	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1936 ..	79,1	80,1	82 -	77,7	80,2	77,3	73,5	58,5	70,4	75,6	77,3	76,8
1937 ..	79,4	87,8	93,0	94,1	70,6	97,8	96 -	78,0	95,3	98,7	94 -	98 -
1938 ..	97,4	101,5										90,4

SWEDEN.

There has been a decided decline in the receipt of orders during the first quarter of this year as compared with the previous quarter in 1937. This position has been brought about by the overstocking of goods by retailers during the course of last year. This situation has caused a certain amount of curtailment of working time especially among the weavers of fancy goods.

'There has been no alteration in wages rates.

(*Svenska Bomullsfabrikantföreningen*)

SWITZERLAND.

The unabated fall in cotton values continued its restricting influence on sales also in the first quarter of 1938, and political events have reacted unfavourably as regards prospects for business. In spite of efforts by some firms to keep running by producing goods for stock, all through the industry the number of workpeople had to be reduced and the working hours cut down to a considerable extent. In the spinning and weaving sections the production has varied between about 60 and 85% of the normal and the lowest point does not yet seem to have been reached.

This unfavourable situation has resulted in a sharp fall in prices and has put an end to wage increases.

The following is the original report in German :—

Die Absatzhemmende Wirkung der Baumwollbaisse hielt auch im 1. Quartal 1938 unvermindert an, überdies mehrten die politischen Vorgänge das Misstrauen in die Geschäftslage. Auf der ganzen Linie musste, trotz teilweiser Streckung des Arbeitsvolumens durch Produktion von Lagerware, die Belegschaft abgebaut und in erheblichem Umfang die Arbeitszeit reduziert werden. In den einzelnen Sektionen von Spinnerei und Weberei schwankte die Beschäftigung zwischen ca. 60 und 85% des Normalstandes, womit aber der Tiefpunkt noch nicht erreicht zu sein scheint.

Diese ungünstige Situation brachte einen scharfen Preiseinbruch mit sich und setzte den Lohnerhöhungen für einmal ein Ende.

U.S.A.

The monthly report of the United States Census Bureau shows that the consumption of lint cotton by domestic mills in March amounted to 511,000 bales, against 428,000 bales in February and 779,000 bales in March last year, making 4,024,000 bales so far this season, against 5,292,000 bales a year ago. Stocks in the hands of manufacturers amount to 1,772,000 bales, against 1,815,000 bales in February and 2,080,000 bales in the corresponding month of 1937, and in outside warehouses 10,956,000 bales, against 11,656,000 bales and 5,037,000 bales.

Spindles active during the month of March totalled 22,288,000, against 22,357,000 in February and 24,639,000 in March last year.

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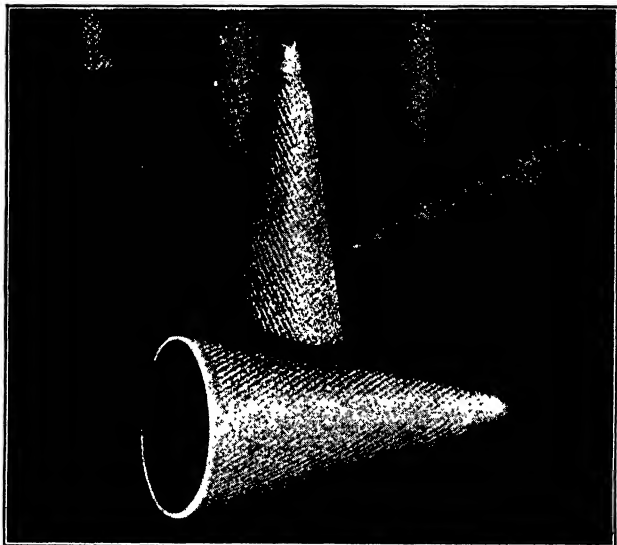
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ARGENTINA.

The Ministry of Agriculture recently issued its first estimate of the production of cotton fibre during the present season 1937-38, on the basis of investigations made by the *Junta Nacional del Algodón*. The estimate forecasts a yield of 72,000 tons of fibre, compared with the actual output in the 1936-37 season of 31,170 tons; in the latter case, however, the crop was damaged to a very considerable extent by persistent drought, and it will be recalled that the first estimate for that season was as high as 78,000 tons. Production of cotton in Argentina has shown a notable increase during recent years, the average for the years 1923-24 to 1927-28 having been 18,801 tons, while the peak figure of 80,957 tons was reached in 1935-36.

According to the report which accompanied the forecast, the present season started under difficult conditions, lack of rains in the Spring having occasioned considerable delay in sowings, while in some regions, as for instance, parts of Santiago del Estero, sowing was impossible, and in the whole of that zone the area under cultivation represents only 10 per cent. of that which had been originally intended.

Subsequently, the report states, the abundant rains which were experienced in January in the cotton-growing region, although arriving rather late, succeeded in transforming the outlook to the extent that it can be said that prospects are now good. The only factor which still has to be feared, and which may cause any serious reduction in the estimate given above, is any invasion of locusts from the South. The plague has already made its appearance in some zones.

(*Bank of London and South America Ltd.*)

El Algodon Argentino.

The *Junta Nacional del Algodon* of the Argentine Ministry of Agriculture have recently published an illustrated brochure describing the progress made in the cultivation of cotton in Argentina during the past few years. Each stage of production is dealt with fully, from the seed to the finished bale. Over one hundred splendid photographs bear eloquent testimony to the thoroughness with which the Ministry have undertaken this work, upon the production of which they are to be congratulated.

BELGIAN CONGO.

Cotton production in 1937 is estimated at 36,762 metric tons (equivalent to about 168,000 bales of 478 pounds), a substantial increase over the 1936 crop, which amounted to 30,701 tons (142,000 bales), according to official statistics. Cotton exports for the 11 months, January to November, 1937, totalled 31,155 tons and will probably reach about 33,000 tons for the year. Total exports for 1936 amounted to 27,013 tons.

(Textile Raw Materials)

BRAZIL.

Present indications are that Brazil will harvest a cotton crop of 2,282,000 bales (478 pounds each) during the 1937-38 season, according to a cable received by the Bureau of Agricultural Economics from the office of the American Consulate General in Rio de Janeiro. A crop of this size would represent an increase of 33 per cent. over the 1936-37 crop and an increase of 122 per cent. compared with the average for the 5 years ended with 1935-36. Until recently, estimates had indicated an increase of only 10 to 15 per cent. over last season's crop.

The estimate for the current season, says the Bureau, is preliminary and may be substantially reduced, especially if climatic conditions in Southern Brazil are unfavourable or if insect damage should develop. Cotton production in Brazil, however, has shown a marked upward trend in recent years, the 1936-37 crop having amounted to 1,712,000 bales compared with an average of 1,029,000 bales for the 5 years ended with 1935-36.

The first estimate of the 1937-38 cotton crop in Southern Brazil is for a harvest of 1,414,000 bales. This compares with 1,068,000 bales harvested in 1936-37 and with the average crop of 473,000 bales for the 5 years ended with 1935-36.

Production also has been expanding in North Brazil. The second official estimate of the crop in that region, issued last December, was for a harvest of 868,000 bales. This compares with 644,000 bales harvested in 1936-37, and with the average of 556,000 bales for the 5 years ended with 1935-36.

COTTON PRODUCTION IN BRAZIL

Season	Northern Brazil	Southern Brazil	Total
	bales	bales	bales
1931-32	428,882	126,377	555,259
1932-33	258,648	191,274	449,922
1933-34	483,278	530,377	1,013,655
1934-35	782,255	576,517	1,358,772
1935-36	826,029	939,012	1,765,041
5 Year Average ..	555,818	472,711	1,028,529
1936-37	644,000	1,068,000	1,712,000
1937-38	*868,000	†1,414,000	‡2,282,000

* Second official estimate.

† First official estimate.

‡ Preliminary.

The cotton season in Sao Paulo terminated on February 28, and we already have available the amount of cotton classified through the excellent services of the Sao Paulo Classification Bureau.

Mr. Garibaldi Dantas recently published the following table, which shows the total crop of the 1936-37 season, classified according to Brazilian types :—

(COTTON CLASSIFICATION—TOTAL SAO PAULO CROP 1936/37)

TYPES	BALES		KILOS		% 1937	
	1936	1937	1936/1937	1937	1937	1936
1....	—	—	—	—	—	—
2....	3,301	994	566,746	177,663	0,32	0,06
3....	96,837	30,390	15,656,054	5,348,313	6,85	2,64
4....	299,316	160,509	31,893,566	28,442,256	29,85	14,84
5....	361,383	346,571	62,615,427	61,293,469	35,41	38,25
6....	182,204	329,349	31,459,934	58,252,615	17,80	22,75
7....	60,246	197,424	10,447,918	34,630,259	5,91	17,09
8....	18,175	64,633	3,097,025	11,220,953	1,75	5,54
9....	4,742	13,807	802,186	2,374,763	2,45	1,17
Inf. 9....	1,641	5,682	272,765	677,523	0,16	0,44
TOTAL ..	1,622,636	1,147,759	176,810,411	202,618,119	100,00	100,00

Of the above 202,618,119 kilos, 153,473,908 kilos were exported up to the end of January, Japan being the largest importer followed by the United Kingdom, as will be seen from the following table :—

DESTINATION	BALES	FROM 1ST MARCH	
		KILOS	VALUE
Liverpool	185,223	33,062,330	126,072,696\$610
Kobe	152,763	27,433,361	121,042,344\$131
Bremen	116,056	20,384,551	76,416,034\$133
Hamburg	106,552	18,730,197	72,198,328\$220
Osaka	94,869	16,827,972	74,176,086\$472
Yokohama	33,017	5,917,572	26,594,650\$758
Havre	25,728	4,556,281	18,626,558\$749
Rotterdam	20,876	3,708,972	14,836,940\$492
Gdynia	17,623	3,127,302	13,610,533\$459
Antwerp	15,664	2,777,617	11,284,693\$342
Shanghai	13,037	2,348,261	10,007,502\$429
Leixoes	12,227	2,149,293	7,163,087\$800
Trieste	11,974	2,110,068	9,416,445\$869
Boston	8,087	1,513,172	7,141,767\$759
Dunkerque	6,779	1,205,998	5,183,792\$900
Manchester	6,344	1,125,489	4,302,541\$300
Gothenburg	5,572	1,044,769	4,273,053\$593
Genoa	5,559	987,354	4,416,219\$397
Ghent	3,812	680,041	2,965,817\$673
New York	3,182	592,479	2,956,593\$784
Moji	2,949	528,531	2,499,220\$300
Buenos Aires	2,698	489,352	1,621,246\$700
Abo	1,765	312,936	1,295,749\$300
Venice	1,604	281,915	1,147,091\$700
Czecho-Slovakia	1,532	275,095	1,133,027\$600
Haippong	1,258	236,706	1,110,747\$908
Naples	1,250	217,268	984,792\$000
Warberg	1,084	202,095	845,324\$882
Bombay	943	168,665	819,200\$009
Riga	597	106,716	326,262\$313

SAO PAULO EXPORTS—*continued*

DESTINATION	BALES	FROM 1ST MARCH	
		KILOS	VALUE
Lisbon	389	69,621	213,030 \$900
Reval	374	68,580	329,872 \$000
Amsterdam ..	259	45,712	209,215 \$800
Bergen	248	45,272	187,197 \$100
Wasa	243	44,609	182,888 \$800
Dairen	277	44,281	153,889 \$300
Alborg	131	23,377	118,344 \$900
Stockholm ..	100	18,847	79,978 \$550
Oslo	62	11,244	45,371 \$600
TOTAL	862,707	153,473,902	625,088,140 \$532

The total value of the exports amounted to 625,088,140 \$532. This is exclusive of cotton exported from the Northern cotton growing section. The total area cultivated to cotton in Sao Paulo during the last season was 1,437,248 hectares or 3,449,394 acres, and it is stated by the *Revista de Algodao* that the average price received for seed cotton was 20 \$000 per arroba of 15 kilos, which represents a higher average price than in previous years.

The same compilation states that the quality of the crop during the 1937 season was not as satisfactory as in the previous year, owing to the fact that unfavourable weather set in during the course of the picking season.

As regards staple, 99.97 per cent. of the crop turned out to be from 28 mm. to 30 mm. in length, which is a testimonial to the quality of the seed distributed by the Botanical Section of the Sao Paulo Department of Agriculture. The ginning plants in existence in Sao Paulo have decreased from 381 to 359 during the past season, but on the other hand, the number of gins in these establishments increased from 882 to 917.

The largest cotton producing section of Sao Paulo is that of Marilla, situated about 400 miles from the sea coast, the section of country which, fifteen years ago, was practically uncultivated. Cotton production in the older producing sections is stationery, or is being gradually replaced by truck-farming.

ITALY.

In 1937 the acreage under cotton was more than doubled, the largest increase being in Sicily, with 25,000 acres more than in 1936. The irrigated area is now 16,860 acres, of which 16,630 are in Sicily. In 1937 cotton cultivation was begun in the new province of Littoria on an area of 25 acres, and very encouraging results were obtained. The total of communes where cotton is cultivated has increased from 176 in 1936 to 253 in 1937 in the whole of Italy. Weather conditions in 1937 from the period of sowing to picking were definitely unfavourable, especially in Sicily where crops were also attacked by green-fly. Yields were consequently below average, but on the whole the quality was good.

(*International Institute of Agriculture*)

NICARAGUA.

The 1937-38 cotton crop is estimated at about 3,500,000 pounds, which is considerably lower than anticipated earlier in the season. Exports during the calendar year 1937 of cotton from the 1936-37 crop were estimated at approximately 2,831,000 pounds, compared with 531,000 in 1936 and 214,000 in 1935. Practically the whole crop is exported. Prices offered by the Germans were reported to have been disappointing in some instances.

(Textile Raw Materials)

SUDAN

The Sudan Government Agricultural and Forests Department, Khartoum, recently issued its Cotton Progress Report for February, 1938, Season 1937-38, which runs as follows (in bales of approximately 400 lbs. Lint):—

	Estimated Total Yield.		Picked to Date.		Area under Crop, Feddans.	
	1937-38. Feb.	1936-37. June	1937-38. Feb.	1936-37. Feb.	1937-38. Feb.	1936-37. June
Sakellaridis Irrigated :—						
Gezira { S.P.S. Ltd. }	200,000	186,642	108,348	97,620	167,982	167,288
{ K.C.C. }		36,085	20,597	18,505	38,671	31,837
Tokar	10,000	29,807	793	1,428	20,000	43,000
Kassala	16,250	17,090	3,017	2,593	31,850	30,335
Ducim (Government Estates)	500	524	421	349	500	500
Gondal (Government Estates)	400	663	251	452	390	450
Abdel Magid (Govern- ment Estates) ..	1,625	—	1,223	—	1,720	—
Private Estates ..	10,136	10,028	4,970	6,173	11,570	11,029
Total Sakel. Irrigated	238,911	280,838	139,620	127,120	272,683	284,439
American Irrigated :—						
Berber (Government Pumping Schemes) ..	63,078	2,830	3,078	2,830	2,420	2,484
Dongola (Government Pumping Schemes) ..	2,200	2,263	2,008	1,319	2,177	2,264
Zeidab (Private Estates)	65,243	5,321	5,243	5,321	5,159	5,269
Other Private Estates ..	1,884	989	1,474	802	2,096	1,625
Total Am. Irrigated	12,405	11,403	11,803	10,272	11,852	11,642
American Rain Grown :—						
Kordofan	27,500	24,556	26,248	22,993	116,000	125,000
Upper Nile	793	1,250	555	874	7,500	8,500
Equatorial	3,475	5,268	1,868	2,907	18,698	27,800
Total Am. Rain Grown	31,768	31,074	28,671	26,774	142,198	161,300
Total All Varieties ..	283,084	323,315	180,094	161,166	426,733	457,381
b Final.						

U.S.S.R.

On March 1, the plan of acquisition by the State of the cotton of the 1937 crop was fulfilled. According to this plan, the State was to acquire, including the cotton grown on its own plantations, 2,310,000 metric tons

of unginned cotton, but the total obtained was 2,512,000 metric tons (equivalent to 18,000,000 centals or 3,800,000 bales of 478 lb. net weight of ginned cotton). The production of ginned cotton in 1937 was 900,000 centals (190,000 bales) higher than in 1936. In irrigated areas, preparatory work was in full swing, the area ploughed being 1,312,000 acres, or 35 per cent. of the plan.

(International Institute of Agriculture)

The State and collective farms fulfilled the plan for the sale of cotton to the State by March 1. By that date the quantity sold was 2,514,623 tons of raw cotton which formed 100.1 per cent. of the estimates. This quantity represents an increase of 121,679 tons over the sales to the State from the 1936 harvest.

The Tajik Republic, the Kara Kalpak Autonomous Republic, and the Kazakh Republic have over-fulfilled their sale schedules. These areas supplied 119.9 per cent. of their estimates. All the other cotton areas also exceeded the plans for 1937-38 sales.

The State paid more than 1,000,000,000 roubles as premiums for supplies in excess of the plans. The collective and State farms of the Uzbek Republic received 585,638,000 roubles. The collective and State farms of Turkmenistan and of Tajikistan received 144,705,000 roubles. The collective farms of Kazakhstan received more than 100,000,000 roubles as premiums, and similar amounts were paid to the collectives of Azerbaijan and Kara-Kalpak; the collective farms of the Ukraine received more than 70,000,000 roubles.

In the current year the textile factories of the U.S.S.R. will receive more than 83,000 tons of cotton fibre, 40 per cent. of which will be Egyptian cotton. It is estimated that this quantity will fully supply the needs of the Soviet textile industry.

(Monthly Review of the U.S.S.R. Trade Delegation in the United Kingdom)

AN AMERICAN VIEW OF WORLD COTTON PRODUCTION

The following address was delivered by Mr. P. K. Norris, Senior Marketing Specialist, Foreign Agricultural Service Division, at a meeting of the Association of Southern Agricultural Workers at Atlanta, Ga., on February 2, 1938.

"There are many factors that define the cotton-growing areas of the world, but low temperature is perhaps the chief one that man has not been able to overcome or, in some degree, control. Roughly speaking, the land lying between the 40th parallel north and the 30th parallel south is the part of the earth's surface that meets the temperature requirements of the cotton plant. There are, of course, a few exceptions, but as a rule we think of the world's cotton belt as being the area between these two

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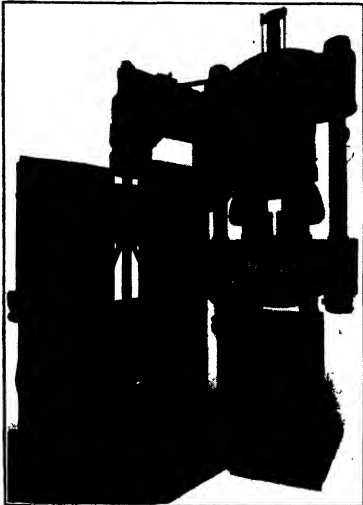
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parallels. It must be understood, however, that even though temperature is favourable, all of this vast area will not grow cotton.

Within this area there are approximately 60 political divisions producing some cotton. Most, but not all, are of minor importance.

Classifying the world's cotton production according to the individual countries, we find six major or outstanding countries producing approximately 85 per cent. of the world's crop. The first country of this major group is the United States which, contrary to the impression some people would like to make, is still the largest cotton-growing country of the world and in recent years has produced from two to four times as much as its greatest foreign competitor. Excluding the United States from this group, we have a major group of five foreign countries headed by India and followed in the order of importance as producers by China, Russia, Egypt and Brazil.

Current production of these major countries ranges from an estimated crop of 5,100,000 bales in India to a crop of 1,900,000 bales in Brazil. The latest available estimates indicate a crop of about 3,500,000 bales each in China and Russia, while Egypt has a record crop of approximately 2,300,000 bales.

The remaining 55 or more foreign cotton countries may be designated as a minor group, the most important of which are Peru, Mexico, Uganda, Argentina, the Anglo-Egyptian Sudan, Chosen, Turkey, Persia and the Belgian Congo. A listing of the lesser important countries of this minor group might include Colombia, Paraguay, Syria, Kenya, Nyasaland, Mozambique, Tanganyika Territory, Nigeria, Australia, Greece and Bulgaria. In past years efforts have been made to grow cotton in Spain and Italy and at one time cotton growing in Hungary and Rumania received State aid, but on the whole production in Europe, with the exception of recent developments in Bulgaria and Greece, is of no importance. The individual production of the countries of the minor group range from a few hundred bales to less than 400,000 bales, but the total accounts for about 16 per cent. of the current foreign crop.

In examining the statistics of foreign cotton production during the last 40 years, it will be noticed that the trend has been definitely upward. Forty years ago the foreign crop was approximately 4,000,000 bales while the current crop is being estimated at 18,000,000 to 19,000,000 bales. Fifteen years ago the total foreign crop passed the 10,000,000 bale mark. Examining the 5-year averages during the last 40 years, we find foreign production has increased from an average of 4,500,000 bales for the 5-year period ended 1903 to an estimated average of 16,400,000 bales during the latest 5-year period.

The increases during the last 20 years have been noticeable, but especially so during the latest 5-year period. The average for the 5 years ended 1922-23 was 8,800,000 bales and 11,300,000 bales for the period ended 1927-28. From 1928-29 to 1932-33 foreign production averaged 11,800,000 bales, but has since 1933-34, including current estimates, averaged 16,400,000 bales annually. This is an increase over the previous 5-year average of some 4,600,000 bales.

The foreign crop of 1936-37 was approximately 18,500,000 bales as compared to 16,000,000 in 1935-36, but the latest estimates indicate that this rate of increase will not be continued this season. It appears now that the foreign crop of 1937-38 may not greatly exceed that of last year. It may be equal to or below it.

The recent increase of foreign cotton as a whole is largely reflected in the increases within the five major cotton-growing countries, namely, India, China, Russia, Egypt and Brazil. The crop in Egypt and India has fluctuated widely during the last 5 years but has not increased so rapidly as in China, Russia and Brazil. The increases within India and Egypt have averaged about 550,000 and 350,000 bales, respectively, during the last 5 years, while the increases in China, Russia and Brazil have totalled approximately 2,800,000 bales. Therefore, approximately 3,700,000 bales of the 4,600,000-bale average increase is accounted for in the five major foreign cotton-growing countries.

Among the minor foreign cotton-growing countries, we find outstanding examples of increases during recent years. In some of the new areas of Africa this increase, when expressed in percentage of past production, appears enormous; for example, the crop of Kenya has increased some 300 per cent. in recent years. However, the current crop is estimated at only about 18,000 bales. Greece is another example of a country that has rapidly increased production. The 1933-34 Greek crop was approximately 32,000 bales, while the current crop is estimated in excess of 90,000 bales. Regardless of the rate of increase, most of the countries of this minor group, when considered individually, are of little importance. However, on an average during the last 5 years the total of this minor group has equalled about 2,400,000 bales or about 900,000 bales increase over the average for the previous 5-year period. This accounts for the remaining increase of the average foreign increase.

Because of the interest in this past increase it might be well to examine some of the conditions under which cotton is grown in foreign countries. First it must be stated that the recent foreign increase did not just happen; it was definitely encouraged. Much of the increase in the minor countries is the direct result of a well-planned programme by several European countries. These countries have for a number of years been engaged in the development of cotton within their African colonies.

The outstanding example of such a programme is the efforts of the British to stimulate cotton growing in their colonial possessions. At the beginning of this century the cotton-spinning interests of Great Britain were much alarmed regarding the future supplies of American cotton. Great Britain was largely dependent upon American cotton, but with the advance of the boll weevil across the American cotton belt and the rapid increase in consumption of domestic cotton by American mills, it appeared to the English spinners that America would shortly consume the entire crop. Cotton would then be scarce and expensive.

For this reason Great Britain felt that it was necessary to stimulate cotton growing within the Empire. An organisation known as the British Cotton Growing Association was formed about 1902, and a little later

the Empire Cotton Growing Corporation was formed. These Associations went about the job of expanding cotton growing in a business-like manner.

In areas in Africa where natives were growing some cotton or where cotton had been grown for a number of years, the Associations built gins, railroads and highways, established markets, opened up trading posts, and in some cases financed a programme for the general improvement of the health and living conditions of the native. These Associations also co-operated with the local governments of the various colonial possessions in the establishment of experiment stations, the development of varieties suited to climatic and soil conditions, and the study of disease and insect control. By its nature, this form of encouragement was slow and the early results were not noticeable, but today, after more than 35 years of work, there is a notable increase in production in some of these African possessions. In Uganda, for example, the steady increase from two bales in 1902 to an estimated crop of 275,000 bales in 1936 indicates the success of the efforts of these Associations.

Other countries also organised cotton promotion associations. Among them were the French and the Belgians. The Portuguese are also interested in the development of cotton growing in their colonies and have in the past employed outside experts to help develop the industry. Here and there a country has employed Americans from time to time, and others, to help solve the problems arising from the production of cotton in new areas. In addition, a large number of foreign students from the older cotton-growing countries have been trained in our southern agricultural colleges. These students, returning to their respective countries, are now using the knowledge and training obtained in the colleges and experiment stations of our cotton belt to increase the cotton output of their native lands. All of this has taken place over a long period of time and the results, while slow, are very noticeable today.

Now a word as to the conditions in the leading foreign cotton-growing countries. Since 1930 I have spent most of my time in travelling and studying cotton production in foreign countries. Reports on Egypt, Brazil, the Anglo-Egyptian Sudan, Mexico and British East Africa have been issued, and as most of you know, I have recently returned from a study of India. I feel that India is a country that will prove to be of increasing interest to American cotton growers.

Considering the five major foreign cotton countries individually, India would logically be discussed at this time, because of its place as a producer. But I want to digress from this order and discuss the countries according to the rate of increase during recent years. This order places Brazil at the head of the list.

Brazil presents the most striking example of increased production among the major cotton countries. This increase has been especially sharp in recent years. Advancing from a total of 450,000 bales in 1932-33, the crop may reach around 1,900,000 bales for the current season, according to trade estimates. Much of this increase has occurred in southern Brazil. Production in north-east Brazil has increased rapidly, but this section has not attracted so much attention as the southern belt.

An examination of past production statistics of Brazil indicates that there are periods in which production reached high peaks and then declined, and again increased and declined, and so on. The peaks appear to occur about every ten years, but it will be noticed that the declines following the peaks have not been so great as in previous years. The present average trend may be expected to continue upward but the rate of increase may not be so great as in past years. Brazil may be approaching another peak of production, but if this be true we need not expect the next decline to reach the previous low level.

The factors contributing to the increased production in Brazil are too numerous to mention here but, touching briefly upon some of the internal conditions, we may say that the low price of coffee has had an important part in stimulating cotton in Brazil. Coffee, the chief export, as you know, has been in a bad way for a number of years. With the advance of world cotton prices following the low level of 1932, many Brazilian coffee growers became interested in cotton. Small farmers who were deprived of their cash income because of the reduced wages on the large coffee plantations turned their efforts to the growing of cotton. Many found it more profitable to spend their time growing cotton than to work for wages on the coffee plantation.

If prices for coffee improve to a point where the plantation owners are again able to offer attractive wages, a large number of small farmers and labourers will no doubt give up cotton growing and return to work on the coffee plantations. But the outlook for such a shift at this time or in the near future is not bright. Cotton appears to have taken its place as one of the leading export crops of Brazil.

The quality of Brazilian cotton is also of interest to American growers. Much of the north-eastern production is tree-type cotton and is of a different staple from that of American upland. The crop of southern Brazil is of American upland type. This cotton has been grown for a number of years in Brazil and, as a result of the work of local experiment stations (some of which are directed by officers trained in the United States), has been developed into varieties giving fair yields and having a staple comparable to the bulk of the American crop. Southern Brazilian cotton has entered the old-world markets in direct competition with our cotton and in some cases has replaced United States cotton, at least temporarily, in British and continental mills.

Two countries that also appear to have made rapid gains in recent years are China and Russia. The current Chinese crop will perhaps be about 3,500,000 bales, while the Russian crop is expected to be somewhat less. So far as we know, no American has recently made an intensive study of the chief cotton areas of Russia. About the only thing we can say is that the cotton acreage in Russia is largely the result of a Government policy which is controlled by conditions within the country. World conditions appear to have but little influence on the size of the Russian crop.

We have some knowledge of the growing conditions in China, but at

present we are almost as much in the dark as to the future there as in the case of Russia. The present situation in China makes it almost impossible to estimate the future of cotton in that country. Production has increased more than 1,000,000 bales compared with a decade ago. This expansion has resulted in a reduction of the imports of outside growths to such an extent that if the trend were to continue, a point would soon be reached at which the consumption of outside growth would be insignificant. It is hard to think of China, with its millions of people to be fed and clothed, as an exporter of raw cotton, but, based on the increases of production in recent years, this may occur. No one knows what the future holds for China.

The 1937 Egyptian crop is being estimated at approximately 2,300,000 bales. This is a record crop that is not likely to be surpassed in the near future. We may not expect large expansion in Egypt because the area is so limited. The cultivated land of Egypt is less than 6,000,000 acres, and while much of it is double cropped it also has to support a population of 15,000,000 people. A recently increased supply of irrigation water has stimulated the reclaiming of some wasteland, but the increased demand for food crops has largely accounted for this increased area. The present crop is likely to remain for some years a record production.

India is the largest producer among the foreign countries. The present crop is estimated at about 5,100,000 bales, from an area of approximately 24,300,000 acres. India's crop in the past has only twice exceeded 5,000,000 bales. The average for a number of years is much below that figure. The outlook for possible expansion in India depends largely upon the ability of the Government of India to expand irrigation and the development of an industrial programme.

India is a densely populated area. Much of the soil is reasonably fertile but, largely because of the distribution of rainfall and the type of cotton grown, yields are low.

The possibilities of developing irrigation are largely limited to north-west India, where the waters are available from the melting snows of the Himalaya mountains. The present irrigation, as far as cotton production is concerned, is largely confined to the Provinces of the Punjab and Sind. Considerable irrigated areas have been developed in other parts of India, particularly in the Madras and Bombay Presidencies, but these areas are not primarily for the purpose of growing cotton. They are really food-producing projects. Most of them are utilised for the production of rice, sugar cane, and cereals. In Central India and in the Ganges Valley considerable progress has been made in developing relatively smaller irrigation projects, but here again the land is used to supplement the food supply of India.

The importance of irrigation is better understood when one realises that for almost seven months of the year there is practically no rain in most of India. The rainfall is due almost entirely to what is known as the monsoon or wet season. The monsoon season starts along the south-west coast about the middle of May and gradually extends north and east over

southern and central India, reaching the foothills of the Himalaya mountains about the 15th of July. The air currents carrying the moisture from the south-west, upon striking the high Himalayan ranges, veer off to the north-west. These north-western winds carry a small amount of moisture and are responsible for the light rains of the Punjab, Sind and the north-west provinces. The rains continue until about the middle of September, when the air currents shift and the wind blows from the land to the sea instead of from the sea to the land. During the monsoon period rainfall varies from 75 inches or more along the coast to as low as 8 or 10 inches in the north-western sections of the Punjab. Over most of Central India a rainfall of approximately 25 to 45 inches falls during the monsoon. Crops are planted at the beginning of the rain and grow to some extent after the rainy seasons, but during something like half the year the bulk of the land undergoes a forced fallow period.

Many of the small irrigation projects of India are nothing more than reservoirs for holding the water that falls during the monsoon. During the dry season, land is irrigated from these dams or reservoirs. As these small irrigation projects are increased the crop area of the country is increased. The land is made to produce two crops a year; one during the monsoon and the other during the dry season from the water stored in the reservoir. But as stated, most of these smaller projects are the result of the demand for an increased food supply rather than an attempt to expand cotton acreage.

The expansion of irrigation for cotton is largely associated with the development of larger projects in the Punjab and Sind Provinces. Some of these projects are of enormous size. The Lloyd Barrage, for instance, when fully developed, will include an area almost as large as the total irrigated land of Egypt. It is estimated that more than 45,000,000 acres are now under irrigation in all India, and that proposed projects will bring several million additional acres under irrigation.

To American cotton producers the development or expansion of cotton in irrigated districts of India is of prime importance, not only because of increased production but also because of the quality of the cotton there produced. Much of it is from American seed and can be sold in direct competition with American cotton. In the past we have not suffered greatly from the competition of Indian cotton, largely because much of India's crop is of a staple length, much shorter than most of our crop. Its uses have been limited chiefly to countries where a low-count yarn is required. Europe, which is one of the chief outlets for the American export crop, requires a staple cotton longer than most of the Indian crop.

But during late years, with the expansion of irrigation works and the development of varieties of American cotton suited to Indian soil and climatic conditions, the production of the longer staple cotton of India is increasing. While it is true that India is consuming increasing quantities of this type of cotton, it is also likely that in the future India will grow a considerable quantity of cotton that has a staple comparable with the bulk of the American crop.

THE DEVELOPMENT OF COTTON PRODUCTION IN TURKEY

One of the questions in which the Banque Agricole has interested itself, and one incidentally to which great importance is attached, is the question of cotton production, for it is this year that concrete results have been forthcoming for the first time.

The goal which has been aimed at has been the production throughout the entire country of long staple cotton from 26 to 30 mm. in length, which has been demanded by both the domestic spinning industry and foreign buyers, and the reduction to the minimum of costs of production. It is for this object that the Five Year Plan has been designed ; satisfactory results have been produced in this, the fourth year of the application of the Five Year Plan.

The annual consumption of the Turkish cotton spinning industry, allowing for complete shift working, is about 18,293 metric tons of long staple cotton, 24 to 30 mm. in staple, and 7,440 metric tons of shorter staple cotton. This year the total production of the country is estimated at 20,000 metric tons of long staple cotton and 40,000 metric tons of shorter staple cotton. It can be seen from these figures that after having satisfied the cotton requirements of all Turkish spinners this year, there will still be a surplus of 34,263,000 kgs. of cotton for disposal.

If prices, which are low all over the world at the moment, rise a little, and if the amount realised by the export of cotton seed is taken into account, a total of 26,000,000 £tqs. should be obtained, according to these production figures.

Simultaneously, with the extended technical research which has enabled the authorities to indicate to the farmers the varieties of cotton they can best cultivate in the different districts whilst at the same time maintaining quality, the volume of Turkish cotton production has shown a marked increase during the last few years, as the following table shows ; the figures given are only approximates.

				Area sown (in hectares)	Total crop (in metric tons)
1932..	..	..	..	158·116	20·209
1933..	..	..	..	162·140	28·052
1934..	..	..	..	197·060	34·865
1935..	..	..	..	209·945	52·257
1936..	..	..	..	253·635	51·779
1937..	..	..	..	317·000	60·000

During the past few years, in conformity with the plan for increasing cotton production, former sowing of inferior seed has given place to sowing of selected seed in the districts of Adana, Icel, Malatya, Elâziz, Diyarbakir, Urfa, Marach, Gaziantep, Izmir, Manisa, Antalya, Nazili and Iznik. At the same time, the problem of reducing costs of production must be effectively pursued. The experimental stations established by the Ministry of Agriculture at Adana, to study the question of the production

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and improvement of cotton, have conducted a series of technical experiments in this connection, the results of which have been shown to the farmers.

In order to make a practical demonstration to the farmers of the most modern methods of cotton cultivation, and the technique of mechanisation, seventy-three cultivators have this year been invited to co-operate with the State in their work. Thanks to this collaboration, the cultivators have shared in the benefits resulting from the utilisation of machinery, as well as from the application of the most modern methods, and have had a practical grounding in the employment of new working systems.

Thus the farmers will be able to judge from actual experience, and not from hearsay, the advantages accruing from modern methods of cultivation. Nearly 500 mechanical tractors, the utilisation of which facilitates cultivation and cuts down labour expenses, have been provided during the course of this year in the districts of Seyhan, Icel, Antalya, Diyarbakir, Elâziz, Urfa, Izmir and Manisa, and the method of their utilisation has been shown to the farmers at demonstrations which have been staged in the open fields, by Government officials.

During the course of last year, 1,809,686 kgs. of new cotton seed have been distributed under the auspices of the Ministry of Economics. The impression created by these efforts to improve cultivation, under the republican regime, has not only had the effect of increasing the country's financial receipts ; it has also served to raise the cultural standards of the farmer by showing him what can be accomplished by improved technical methods of cultivation.

(Translated from " Ticaret Ve Sanayi Odasi Mecmuasi," Istanbul)

THE CLASSIFICATION OF CHINESE COTTON

By Dr. Y. C. LEE, of the Foreign Trade Commission of the National Government of China.

INTRODUCTION

There has been marked progress and improvement in Chinese cotton in the recent years both in quantity and quality, through the efforts of Governmental Institutions. In the field of research for the classification of Chinese cotton, the Cotton Industry Commission of the National Economic Council has achieved decided success. Their standards have been readily accepted by the domestic market. Now that the Government has decided to push the sales of Chinese cotton in the foreign markets, it will be of prime importance to publish the results of cotton classification so that the foreign buyers will know exactly what they are buying and what is to be expected from the future shipments. The classification of Chinese cotton is based upon the universal cotton standards, amplified by the results of research of Chinese Governmental institutions, and checked

and approved by experts of other nations, including Mr. F. Taylor, the American cotton expert. In this article we will give the reader a brief summary of our Cotton Standards and methods of classification.

CHINESE COTTON STANDARDS.

The Chinese Cotton Standards are as follows :---

(A) *Standard of Variety.*

Chinese-American Cotton	(1) Long Staple.
	(2) Short Staple.
Chinese-Native Cotton	(1) Native Cotton Type A.
	(2) " " " B.
	(3) " " " C.
	(4) " " " D.

(B) *Standard of Grade*

Middling Fair	Middling
(Strict Good Middling)	(Strict Low Middling)
Good Middling	Low Middling
(Strict Middling)	(Strict Good Ordinary)
Good Ordinary	

Note :—Those in parentheses are half-grades, and no samples have been provided.

(C) *Standards of Staple*

$1\frac{1}{4}$ in.	31.7500 mm.	$\frac{13}{16}$ in.	20.6375 mm.
$1\frac{3}{16}$ "	30.1625 "	$\frac{3}{4}$ "	19.0500 "
$1\frac{1}{8}$ "	28.5750 "	$\frac{11}{16}$ "	17.4625 "
$1\frac{1}{16}$ "	26.9875 "	$\frac{5}{8}$ "	15.8750 "
1 "	25.4000 "	$\frac{9}{16}$ "	14.2875 "
$\frac{15}{16}$ "	22.2250 "	$\frac{1}{2}$ "	12.7000 "
$\frac{7}{8}$ "	23.8125 "		

(D) *Cotton Uniformity Standards*

1. Uniform .. $92.5\frac{0}{10}$ or more.
2. Medium .. $85\frac{0}{10}$ - $92.4\frac{0}{10}$.
3. Irregular .. $84.9\frac{0}{10}$ or less.

(E) *Cotton Strength Standards*

1. Strong .. 10.5-7.5 gm.
2. Medium .. 7.4-4.5 "
3. Weak .. 4.4-1.5 "

Note :—If the average of simple cotton fibre is stronger than 10.5 gm., it may be designated as extra strong.

METHOD OF CLASSIFICATION.

(A) Classification of Variety : With the Chinese-American cotton, we only have to determine whether it is of long staple or of short staple. In the case of Chinese native cotton, we have to use both our eyes and hands to find out their fibre characteristics, such as fineness, rigidity and strength in order to determine their rightful type. The specifications of each variety are enumerated as follows :

Chinese American Cotton

(1) Long Staple.—Chinese-American cottons with a staple of one inch or above are classified under this variety. The principal producing districts are as follows :

Honan :	Ling-pao	Shantung :	Ping-Hsien
	Weng-Siang		Kao-Tang
	Shen-Chow	Shansi :	Ping-Loh
	Loh-Yang		Ling-Feng
Hopeh :	Tung-Peh-Ho	Hunan :	Chang-Teh
	Yu-Ho		Lee-Hsien

(2) Short Staple.—This variety includes all Chinese-American cotton with a staple length from $\frac{3}{4}$ in. to 1 in. Anything below $\frac{3}{4}$ in. in staple length and shows great irregularity is disqualified.

Chinese Native Cotton

- (1) Type A.—Cotton of this type is characterised by its black seeds, without fuzz, but the improved white seed cotton is also included. Its fibres are long and fine. The Tungchow chicken-foot cotton, Chang-Ying-Sar black seed cotton, and the improved white seed cotton of the various experimental stations are representatives of this type. The required staple length of this type is $\frac{5}{8}$ in. or above.
- (2) Type B.—Cotton of this type is characterised by the white fuzz on the seed surface and the quality is a little inferior to Type A. Shanghai and Tai-Chong cotton are good representatives of this type. The required staple length is same as above, that is, $\frac{5}{8}$ in. or above.
- (3) Type C.—This type has hard and coarse fibres. They are represented by the coarse staple cotton of Yui-yao and the iron seed cotton of Chia-hsiang. Its required staple length is $\frac{1}{2}$ in. or above.
- (4) Type D.—The outstanding feature of this type is its abnormal hardness. It can be used for spinning coarse yarns, weaving rugs, mattresses and mixed cotton-wool fabrics, and manufacturing explosives. Its required staple length is same as type C, that is, $\frac{1}{2}$ in. or above.

(B) Grading : The grading of cotton is done by careful observation of its colour, foreign matter, and preparation in comparison with the standards. The description of the various grades of Chinese cotton is as follows :

- (1) *Middling Fair*.—Creamy, lustrous, silky, clean, well-ginned, fluffy, motes barely perceptible. (Except for Type A, black seed, Chinese native cotton very rarely possesses silky lustre.)
- (2) *Good Middling*.—Creamy, lustrous, less silky, few stains, well-ginned, leaf pieces and broken seeds prominent, but few.
- (3) *Middling*.—Noticeable stains (yellow and grey stains, and light yellow spots), white but not dingy, fair ginning, few naps, more leaf pieces and seed fragments.
- (4) *Low Middling*.—Dull, spots and stains prominent, dirt, more leaf pieces, motes, seed fragment, gin cuts, naps noticeable.
- (5) *Good Ordinary*.—White and dingy, spots and stains more prominent, sticks, hulls, dirt, sand, naps, gin cuts.

(C) *Stapling*: The hand pulling method is commonly used by graders for the measurement of staple length. For checking purposes, the scientific Balls' sorter is usually applied. In using the hand method, a handful of cotton is first broken into two parts, and successive "pulls" or tufts of fibre are drawn from one part. By repeating this process, and lapping successive pulls over each other, a more or less rectangular mass of parallel fibres is obtained. Then the ends of the tuft are evened up by grasping the protruding ends and rejecting those fibres which are noticeably the longest. A "twilight zone" soon appears at the two ends. The measurement may then be accomplished by laying the tuft upon a piece of velvet, "blocking off" the staple by making lines through the "twilight zone" at right angles to the direction of the fibres, and applying a scale to the space between the transverse marks.

(D) *Uniformity*.—The uniformity of the staple length is determined by observing the figure of the "twilight zone" of the tuft. By the use of a Balls' sorter, and by adding up the percentage of the model length and that of sections having a difference of $\frac{1}{4}$ in. with the model length, we get the percentage which indicates the degree of uniformity of the cotton. The higher the percentage, the more uniform is the staple length.

(E) *Fibre Strength*.—The fibre strength of cotton is usually determined by graders' own experience. For final decision, a fibre tester is oftentimes used.

UNSTANDARDIZED COTTON.

The following cottons are not covered by the standards :—

- (1) Mixed cotton of Chinese-American and Chinese Native variety, or cotton which shows great irregularity in length and fineness.
- (2) Cotton which is adulterated with sand, cotton seeds, seed cotton, gypsum or other adulterants.
- (3) Cotton with a fibre strength less than two grams for Chinese-American cotton, and less than three grams for Chinese native cotton.
- (4) Yellow tinged, yellow stained, brown, water stained and wasted cotton are disqualified because no standards have been set up. Tentative standard for yellow tinged Chinese-American cotton has been set up but not yet promulgated.

COTTON PRODUCTION IN ARGENTINA, 1936-37

As a result of investigations recently undertaken by the Junta Nacional del Algodón, the following information has been elicited concerning the area cultivated, seed cotton and lint cotton produced in the various districts during the 1936-37 season :—

Districts	Area Cultivated (hectares)	Seed Cotton Produced (in tons)	Fibre Produced (in tons)	Yield per hectare (in kilos)	
				Seed Cotton	Fibre
Chaco	202,000	66,185	17,750	328	88
Corrientes	39,190	19,360	5,479	494	140
Formosa	18,480	12,333	3,615	667	196
Sgo. del Estero	17,740	10,169	2,868	573	162
Santa Fé	7,350	3,583	1,008	487	137
Otras	3,970	1,509	450	380	113
Total	288,730	113,139	31,170	392	108

(Junta Nacional del Algodón)

The following details regarding the ginning of the 1936-37 crop have also been made available :—

Districts	No. of Gins	Cotton Ginned (in tons)	Fibre Produced (in tons)	Cotton Seed Produced (in tons)
Chaco	81	75,905	20,590	51,866
Sgo. del Estero	10	10,128	2,857	6,956
Corrientes	16	18,610	5,267	12,615
Formosa	4	3,694	1,084	2,470
Santa Fé	4	3,561	1,002	2,420
Otros	7	1,241	370	830
Total	128	113,139	31,170	77,157

EXPORTS OF COTTON FROM ARGENTINA, 1936-37

Month	1936		1937	
	Quantity (in kilos)	Value in \$ m/n.	Quantity (in kilos)	Value in \$ m/n.
January	1,826,886	1,367,425	2,270,844	1,985,905
February	2,262,883	1,672,270	2,226,744	1,967,177
March	970,879	738,530	1,149,688	1,109,241
April	1,767,369	1,402,850	738,249	763,584
May	5,714,089	4,365,955	815,802	798,948
June	7,052,543	5,507,075	1,591,907	1,704,388
July	8,272,667	6,813,293	492,211	536,073
August	7,324,425	5,662,779	1,029,589	1,029,427
September	6,199,000	4,895,848	1,505,278	1,372,402
October	3,766,443	3,093,107	659,910	517,055
November	2,082,420	1,707,536	No Exports	
December	1,965,420	1,676,548	.	
Total	49,204,726	38,903,216	12,480,222	11,784,200

The foregoing particulars in respect of seasons back to 1920-21 are as follows :—

AREA SOWN, AND COTTON PRODUCTION IN ARGENTINA
SINCE 1920-21

Year	Area Sown (hectares)	Seed Cotton	Production Fibre (in tons)	Cotton Seed
Average				
1920/1-1924/5	45,902	29,195	8,401	20,207
1925-26 ..	110,058	103,263	29,347	72,057
1926-27 ..	71,746	43,193	12,525	29,803
1927-28 ..	85,000	82,765	24,920	56,337
1928-29 ..	99,000	92,644	25,690	64,519
1929-30 ..	122,000	115,404	32,614	79,240
1930-31 ..	127,394	107,324	30,051	74,483
1931-32 ..	136,159	124,994	36,686	84,333
1932-33 ..	138,500	113,318	32,511	78,144
1933-34 ..	195,000	155,236	43,357	106,833
1934-35 ..	286,147	238,285	64,038	164,187
1935-36 ..	368,000	291,701	80,957	199,658
1936-37 ..	410,900	113,139	31,170	77,157
1937-38 ..	419,030	—	—	—

BRAZIL—LATEST ESTIMATES

The following are the Brazilian Government's latest estimates of cotton production in the various States in Northern and Southern Brazil during the 1937-38 cotton season :—

A.—SOUTHERN BRAZIL.—First Estimate.

State.	Kilos.
Bahia (Southern Zone)	7,000,000
Rio	4,000,000
Minas Geraes	35,000,000
S. Paulo	250,000,000
Paraná	9,000,000
Other States	1,500,000
Total	306 500,000

B.—NORTHERN BRAZIL.—Third Estimate.

State.	Kilos.
Pará	2,500,000
Maranhão	10,000,000
Piauhý	4,500,000
Ceará	35,000,000
Rio Grande Do Norte	25,000,000
Parahyba	45,000,000
Pernambuco	30,000,000
Alagoas	12,000,000
Sergipe	6,500,000
Bahia (Northern Zone)	1,000,000
Total	171,500,000

The sum total of these two estimates represents a total production for the whole country of 478,000,000 kilos, equivalent to 2,202,765 bales of 478 lbs. each.

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FINAL GINNING REPORT, 1937-38

The final ginning report issued on March 21 by the Census Bureau shows that the total ginned amount of last year's American cotton crop is estimated at 18,242,000 running bales, which compares with 12,141,000 bales and 10,420,000 bales for the two previous seasons. The amount ginned since the last report, which was made up to January 16, is 596,000 bales, against 185,000 bales in the same period last year and 167,000 bales two years ago. The cotton included in the total but not yet ginned is estimated at 59,000 bales, against 27,000 bales estimated as unginned after the March canvass last year. The total includes 326,000 round bales, 4,000 bales Sea Island, and 11,000 bales American-Egyptian, against 282,000 round bales and 18,000 bales American-Egyptian shown in the corresponding report last year. The average gross weight of bales is estimated at 519 lb., against 510.6 lb. last year, and the total ginnings in equivalent 500 lb. bales at 18,934,000 bales, against 12,387,000 bales for the previous crop.

The following table gives details of ginnings with comparisons:—

	1938	1937	1936
Alabama	1,566,000	1,135,027	1,033,457
Arizona	310,000	187,771	131,541
Arkansas	1,808,000	1,265,622	841,518
California	726,000	436,322	232,725
Florida	35,000	27,654	26,653
Georgia	1,475,000	1,086,458	1,052,662
Louisiana	1,051,000	742,565	541,360
Mississippi	2,560,000	1,862,515	1,226,295
Missouri	389,000	301,267	182,823
New Mexico	153,000	104,999	70,178
North Carolina	780,000	606,681	579,313
Oklahoma	756,000	289,740	562,704
South Carolina	995,000	804,232	738,744
Tennessee	633,000	422,197	315,602
Texas	4,947,000	2,825,420	2,849,750
Virginia	40,000	30,543	27,619
Other States	18,000	12,363	7,402
Total	18,242,000	12,141,376	10,420,346

THE COTTON SECTION OF THE NEW FARM BILL

The new Farm Bill or to give it its correct name, the Agricultural Adjustment Act of 1938 was recently legalised in the United States. The following are the main points of the Act (as extracted from *The Cotton Ginners' Journal*) in so far as the interests of the cotton growers are concerned :—

Payments will be made on a new basis, to cotton producers. The amount has been tentatively set at 2·4 cents per pound on cotton grown on allotted acreage.

Small Payments Increased : Compliance payments to small producers are increased on a diminishing scale beginning with an increase of 40 per cent. if check is \$20 or less, and decreasing as the compliance check increases until the payment reaches \$200.

Allotment : All allotments to cotton producers will be on an acre basis and not bales grown.

Minimum Allotment : No producer who has planted any cotton during the past three years shall be allotted less than five acres.

New Land : Not more than two per cent. of the state allotment can be made for land not planted to cotton during one of the last three years.

Restrictions : No producer will be permitted to increase his production of dairy or poultry supplies above normal, except for consumption on the farm.

Quotas : Quotas can be proclaimed by the Secretary but not applicable if more than one third of the farmers voting on such quotas, vote "no."

The application of "quotas" does not increase the Soil Conservation Payments. However, no loan will be made on any of the basic crops any year that quotas are not in effect.

Quotas have been proclaimed for cotton for 1938, the election to be held March 12.*

* The election resulted in favour of quotas being established—ED.

ACREAGE ALLOTMENTS FOR 1938

The Secretary of Agriculture has announced that the "national allotment" of acreage for 1938 is 26,384,417 acres. This represents the aggregate of the acreage allotments of all individual growers in the country. In view of the inducements offered to the growers to restrict their planting, it is believed that most of them—probably 85 to 90 per cent.—will agree to co-operate in the Government programme and will keep their planted areas within their allotments. Even allowing for 10 to 15 per cent. of the growers not doing so, it is thought in some usually well-informed quarters that the total acreage may not exceed 27,000,000 acres. The Government acreage control programme for this year is

obviously much stronger than that of last year, from the standpoint of pressures brought to bear on growers to curtail their acreages, and the current price of cotton is only about 9 cents, compared with 13 to 15 cents in the planting period last spring. It may be noted that, if the planted acreage should be 26,384,417 acres, the abandonment of acreage of average proportions, and the yield per harvested acre equal to the five-year average from 1933 to 1937 inclusive, namely, 206.1 pounds, the crop would be approximately 11,100,000 bales of 500 pounds gross weight.

(*New York Cotton Exchange Service*)

The new Farm Bill permits planting of 26,027,000 acres of cotton for 1938 and according to the Agricultural Adjustment Administration the acreage would be allotted to states as follows:—

States	Acreage	States	Acreage
Alabama	2,059,000	North Carolina	886,000
Arkansas	2,288,000	Tennessee	749,000
Florida	74,000	Virginia	49,000
Georgia	2,005,000	Illinois	2,000
Mississippi	2,528,000	Missouri	357,000
Louisiana	1,169,000	Arizona	186,000
Oklahoma	2,175,000	California	385,000
South Carolina	1,255,000	Kansas	900
Texas	18,000	New Mexico	97,000

(*Cotton Digest*)

U.S.A. LOAN COTTON

The Commodity Credit Corporation announce that to March 24 it has extended loans against 5,152,282 bales of cotton, including cotton since repossessed. The loans total 225,119,798.74 dollars and represent an average price of 8.38 cents a pound.

COMPLAINTS OF FOREIGN BUYERS AGAINST THE PACKING AND BALING OF AMERICAN COTTON

The following article was extracted from *The Cotton and Cotton Oil Press*, of Dallas, Texas, dated January 22, 1938.

For many years we have heard complaints from foreign consumers against the American cotton bale. These complaints include false-packing (sandwich bales), mixed-packing (two-sided bales), oil stains, paint or stencil stains, gin falls, sandy bales, water-packed, and country damage. Also, the introduction into the bales, by accident or intent, of iron and steel bars, pieces of ties and tie buckles, pieces of cloth, old felt hats, bottles, matches, and similar miscellaneous foreign matter.

Mr. Fred Taylor, of the Bureau of Agricultural Economics, was sent to Europe two years ago to make a study of this subject. During the 1936-37 cotton season, he inspected many bales. Unfortunately, Mr. Taylor admits, there is justification for some of the complaints against our cotton.

During the summer of 1937, Mr. Taylor visited many of the larger Southern cotton markets, addressing groups of farmers, ginnermen and merchants, and illustrating his talks by various exhibits of the material collected in Europe. In October, 1937, he returned to Europe to continue the investigation.

Mr. Taylor repeatedly emphasised that, on a percentage basis, the number of "bad" bales that reach our foreign consumers is relatively a very small part of the total. Nevertheless, the resulting difficulties of even a few bad bales are real and very aggravating to the merchant and spinner. Rejections, replacements, allowances, and losses to the American shipper and the foreign merchant also are accompanied by difficult problems on the part of the spinner. And the trade is confronted with financial losses as well as with technical or manufacturing difficulties.

Our foreign customers frequently complain that the American bale is poorly packed. Another criticism is the shabby and unkempt appearance of many of our bales which are covered with ragged bagging, and with heavy side patches. In addition to having a high percentage of tare, our bale shows more of its cotton exposed than do most bales of foreign cotton. Upon his arrival in Europe a few weeks ago, Mr. Taylor reported that the trade generally seemed to feel that the quality of the new crop would be excellent. We had had a favourable growing season. Picking and ginning had gone forward rapidly. So naturally, foreign buyers were looking forward to deliveries of cotton of excellent grade and staple. Because of the constant rains after picking had started, however, Mr. Taylor reports many complaints of excessive moisture, mildew, and, of course, gin-cut cotton.

Moisture tests by one of the largest cotton spinning combines in Europe, which operates 45 mills and over three million spindles, reported nearly 12 per cent. moisture or an actual average excess of 3.44 per cent. This would mean a loss to the spinner of over 17 pounds per bale, because he is compelled to sell his yarn on a moisture-standard percentage not exceeding 8.5 per cent. Any moisture percentage exceeding 8.5 per cent., therefore, disappears between the bale of raw cotton and the finished yarn. This is checked off as "invisible loss" and becomes a direct levy against profits. In the above case, namely 3.44 per cent. excess moisture, the "invisible loss" would be about \$1.50 per bale based on current Liverpool prices.

In addition to this loss, there is a further loss to the mill. The gin-cut bale also results in a greater amount of waste, because most of the neps and rough cotton are removed in processing.

Consequently, the United States has received some unfavorable publicity relative to damp or wet cotton. Most of the complaints come chiefly from English mills and cotton merchants, but they also originate on the Continent. Some of the foreign spinners say they cannot under-

stand why we are so careless. They point out that each month they "buy a lot of water which we cannot spin."

Mr. Taylor reports that one large manufacturer, who operates 122,000 spindles, recently sent the following resolution to the English Federation of Master Cotton Spinners' Associations Ltd., with the request that it be placed before the appropriate committee, and that such committee take up the matter with the Liverpool Cotton Association Ltd. :-

"That this meeting views with alarm the increase in the moisture content of some American bales this season, and consider that steps should be taken immediately by the Liverpool Cotton Association Ltd. to prevent an extension of this practice. In our opinion this could be done by sampling one bale in every 10 suspected of being damp and submitting the samples to the Manchester Chamber of Commerce Testing House. In the event of any excess moisture above $8\frac{1}{2}$ per cent. on the dry being found, the percentage excess shall be deducted from the total net weight of the lot in question. The cost of the test to be paid for by the loser."

"While it is realised that nothing can be done about damp or gin-cut cotton after it has already been baled," says Mr. Taylor, "it seems to be worth while to point out to our people that the picking and ginning of wet cotton represents a very definite tax against farm income, besides being a source of real annoyance to our customers."

"To date," Mr. Taylor continues, "we have had only a few complaints of false-packed or mixed-packed bales from the new crop, but have had a number of them against old crop shipments."

Two suggestions seem to be in order, first, that the farmer and ginner never bale wet or damp cotton; and second, a suitable form of gin tag be adopted so that every bale can be traced back to the gin. The majority of ginner need this for their own protection. They would have nothing to fear, while the careless or indifferent ginner would be brought out into the open.

When properly handled, the spinning qualities of both grade and staple of American cotton are unexcelled, and foreign spinners frankly express their preference for it. However, while the lower prices of foreign cottons and the existing trade barriers are bad enough, the complaints and the resultant problems reported due to our careless methods, regardless of whether the complaints are true or false, tend to increase any drift away from American cotton. We also must recognise that the grade and staple of foreign cottons has greatly improved in recent years. Merchants and spinners operate to make a profit and rather than submit to adjustments for quality and condition of shipment, they are persuaded to try foreign cottons. Growers must realise that no longer does the world rely exclusively on our cotton.

Evidence from the other side of the Atlantic is not wanting to prove that the growers and exporters in the United States have become thoroughly alive to the fact that European spinners will no longer accept inferior cotton. This fact was pointed out at the recently held annual convention of the Texas Cotton Association by Mr. B. C. Jackson,

vice-president of the Association. Mr. Jackson stated *inter alia* that, of this year's Texas crop, 66.6 per cent. was below 15-16ths (17.1 per cent. was under 7-8ths), 25.8 per cent. was 15-16ths and 31-32nds, 7.6 per cent. was 1 inch and above.

These figures show that two-thirds of the entire Texas cotton crop was below 15-16ths inch in staple, which means that 66 bales out of every 100 raised in Texas is below that quality which world markets mostly desire.

Mr. Jackson continued : When you consider that more than 90 per cent. of cotton produced in Texas must be exported, one must be led to the final conclusion that we have grossly neglected the important matter of maintaining the staple quality of our cotton.

Now the big question is : What have we done and what can we do to improve the quality of Texas cotton ? It has been determined that the best practical approach to the solution of this problem is through the one-variety cotton communities. The Texas Cotton Association has joined hands with every other organised group within the cotton industry in this State in an effort to conduct a very vigorous cotton improvement campaign through this method.

Farmers bring their cotton to the gins and demand that it be quickly turned out. It is difficult to properly place the blame for this procedure, yet it might as well be admitted that this practice must stop.

Recent cotton ginning laboratory tests made at the station in Stoneville, Mississippi, show that fast feeding of cotton into the gin lowers the value of the lint to as high as \$4.50 per bale. One important finding is that wet cotton cannot be ginned properly under any conditions. This fact should be driven home to the farmers and ginners of this State.

Largely as a result of the findings of this ginning laboratory, many gins are installing cotton dryers to take excess moisture out of the cotton before ginning. An effort is now being made to locate a branch of this ginning laboratory somewhere in Texas, where it is greatly needed.

The farmer who takes the ginner dry-seed and clean-picked cotton, and does not demand that it be immediately turned out, will receive such greater cash returns for his product that he must be made to see the light. Better and complete co-operation must be brought about between the farmer and ginner. Again, here is where the one-variety community can be invaluable. Such communities strongly tend to promote better ginning, prevent plating of bales, eliminate false-packs and two-sided cotton, and give the ginner time to do a good job.

CROP REPORT DATES FOR 1938

The Bureau of Agricultural Economics recently made available a schedule of the dates of issuance of the various cotton crop reports of the Crop Reporting Board :

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Release Dates for Reports on Cotton in 1938.

(Released at 11 a.m., E.T.)

May 25. Revision of acreage, yield per acre, and production of cotton lint and seed, produced in the previous season ; also reduction from full yield per acre due to boll weevil and other causes.

July 8. Report on the acreage of cotton in cultivation on July 1.

August 8. Report as of August 1 on condition, indicated yield per acre, and indicated total production.

September 8. Report as of September 1 on condition, indicated yield per acre, and indicated total production ; also an estimate of the acreage of cotton abandoned since July 1.

October 8. Report as of October 1 on condition, indicated yield per acre, and indicated total production.

November 8. Report as of November 1 on yield per acre and probable total production.

December 8. Report as of December 1 on yield per acre and estimated total production ; gross weight per running bale ; also estimated acreage of cotton for harvest, abandoned since July 1, and acreage in cultivation July 1.

TENDERABILITY OF MIXED-PACKED, GIN-CUT AND SNAPPED BALES

Replying to a number of questions on certificated cotton, often asked in the trade, and laid before him by The Cotton Trade Journal of New Orleans, Mr. C. L. Finch, Supervisor of Administration, U.S. Cotton Futures Act, throws much light on the subject. Mr. Finch repeats each of the questions in his letter in preface to his replies.

The following are some of the questions and answers :—

Are mixed bales tenderable that show a difference of more than one staple on each side of the bale ?

Under the definition for mixed packed cotton any bale which shows a difference in length of staple exceeding $\frac{3}{8}$ inch would be designated as "mixed packed" and would be certificated as untenderable irrespective of the lengths of the samples from the two sides of the bale. If, however, the variation in staple length is less than that indicated, the bale is certificated as of the shorter length, and if such shorter length is $\frac{7}{8}$ inch or more the bale is tenderable, provided it is of a tenderable grade.

Are excessive rough or gin-cut bales tenderable, if so how is the grade arrived at and against what standard are they classed ?

A bale which, in the opinion of the Board, shows damage in ginning through cutting by the saws to an extent that reduces its value more than two grades is designated as "gin cut" and is certificated as untenderable.

A bale, however, which is merely rough in preparation, but not gin cut may be reduced, for example, from Strict Low Middling to Low Middling and certificated as tenderable provided it is $\frac{7}{8}$ inch or more in staple length. The grade standards represent colour, foreign matter, and preparation, and in considering the preparation factor for cotton of the kinds ordinarily submitted for classification under the Cotton Futures Act the Board's determinations are based upon the preparation exemplified by the grade boxes for White cotton. The preparation of the lower grades is rougher than that of the higher grades.

Are snaps or immature staple or what is generally known as IWW cotton tenderable on contracts?

All cotton is graded and stapled on its merits according to the official standards, irrespective of the methods of harvesting. Much snapped cotton possesses characteristics which, according to the standards and the limitations in the fifth subdivision of Section 5 of the Cotton Futures Act, make it untenderable on futures contracts. Some snapped cotton, however, which is mature when harvested and which in every way meets the requirements of the law and the regulations with respect to tenderability is certificated as tenderable. In fact, it is impossible in some instances for the classer to determine whether the cotton has been picked or snapped.

It is believed that the cotton which you refer to as IWW (irregular, weak and wasty), would ordinarily be considered as perished staple, and hence untenderable or reduced on account of such defects to an untenderable length and so certificated by the Boards.

MARCH "INTENTIONS TO PLANT" REPORT

The "Intentions to Plant Report as of March 1" indicates a decrease in cotton acreage of approximately 20 per cent., indicating a total acreage to cotton of about 27,000,000 acres. The report shows that farmers in the main Cotton Belt are planning a moderate but general increase in food and feed crops. The nature of the acreage shift taking place is shown by the indicated acreage to be cut for hay in these States. This is about 5 per cent. over the acreage cut for hay last year and nearly 38 per cent. over the average acreage cut in these States during the 1928-32 period.

THE FUTURE OF THE U.S. COTTON-GROWING INDUSTRY

Mr. Will Witmor, in the course of an article contributed to the Baltimore publication, *The Manufacturers' Record*, makes the following interesting statement:—

"The truth is that we are not producing too much cotton, but at too high a cost. We persist in adopting a defeatist attitude and regard our cotton dilemma as a domestic affair, totally ignoring the important position in point of quantity and quality of American cotton in the world cotton trade.

Never in the history of recorded statistics has the world's consumption of cotton been as great as it was last year. This in spite of the declining price of competitive materials. In other words, consumption of cotton has not declined, but as a commodity its marketability has undergone a transformation.

As long as cotton textiles occupied a position of virtual monopoly in the realm of textiles and the bulk of quantity and quality cotton was produced in America, American cotton producers could count upon sustained demand. But with the steadily mounting production of cotton in foreign countries coupled with lower labour costs, it was a foregone conclusion that America would eventually be faced with competitive production; and the sooner we realise that cotton is no longer a *necessity* the sooner shall we embark upon a constructive future.

Nevertheless, for upwards of forty years, foreign production has increased at a greater rate than has American cotton, and there can be little or no doubt that the increase will be enlarged under intensive methods and materials of production; seed in some instances being supplied free of charge together with growing instructions by respective governments. Ironical though it is, the present policy of price pegging by the American government has been and will be a tremendous incentive further to increase production in foreign countries.

Whether one agrees or not with the theory of subsidisation in some one of its many forms is not of immediate concern, particularly since it is now an universally acknowledged expedient. That being so and assuming the legitimacy of a cotton subsidy, it is a matter of vital concern that the terms under which the subsidy is granted shall be of a constructive nature with a reasonable assurance of the industry returning to at least a semblance of economic stability. The question remains as to how this can be done. The contention of the author is that this can only be accomplished by reducing production costs, a statement which involves an exceedingly large number of factors—physical, biological, mechanical, economic and human. All of which will vary under different circumstances and in different localities.

The reduction of production costs, however, is a relative procedure that can be brought about by one or more of several methods: (1) improve the quality: (2) increase the total percentage of the longer staples: (3) produce a heavier yield: and (4) reduce the actual costs of production.

The question of confining cotton production to those lands having the highest per acre yield in comparison with low per acre cost is one that may become of pressing necessity and automatically involves the question as to what shall be done with the retired land and displaced labour. Also, it is dependent upon the ability to reduce individual production costs. Recent years have witnessed a marked tendency of a shift to the west in



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cotton growing. This has brought growing into the area of irrigation, where for some time the quality was such that its demand was considerably less than the cotton produced elsewhere. This difficulty has now been solved so that the per acre yield, as seen from the accompanying table, is more than 100 pounds greater than the next largest yielding area. On the other hand, per acre production costs are the highest, the variation to the next highest being only slightly less than the total costs of the area having the lowest per acre yield.

Perhaps the greatest opportunity for American cotton lies in the development of a better grade, longer staple, heavier yielding plant and in improved ginning methods, which latter should perhaps be assumed to be included in the classification of grade. While grade admittedly varies from year to year and with countless other factors, particularly as far as colour is concerned, it is also dependent to a great extent upon its appearance after ginning and the presence of foreign matter such as leaf, shale, motes and sand will materially lower the grade, so that both the actual ginning operation and subsequent care are all important. In the latter respect the use of a cotton fabric in place of jute for bagging, should be given careful thought even though its weight reduction may necessitate an increase of lint and the general cost be slightly greater. As far as ginning is concerned, results vary with the care exercised and also with the equipment, some gins possessing elaborate cleaning apparatus. According to reports, present ginning leaves much to be desired, and it is probable that if the claims made on its behalf are substantiated by investigation, the new cotton gin invented by Frank Watson with its centrifugal principle will be a decisive factor in reducing costs. It is said that samples taken from the same lot of seed cotton and ginned on the new and the old type of gin bear little resemblance because of the extraordinarily clean appearance of the former. Arrangements have now been made for the manufacture of 1,000 of these gins which are claimed to have the approval of the Secretary of Agriculture."

The centrifugal gin referred to in the preceding article is described in the following excerpt from the *Textile Recorder* :—

"A new centrifugal cotton gin has been invented in America recently by Mr. F. H. Watson, Jonesboro, Arkansas.

As the name implies, this gin separates cotton fibre from cotton seed, on which it grows, by centrifugal force.

The gin is constructed as follows : the ginning element, which replaces the saws in the conventional gin, is an endless belt covered with hooked teeth similar to the standard gin tooth. This belt is approximately eleven feet long, and is carried by three rollers or pulleys. It may be driven at a rate of thirty-five hundred to five thousand feet per minute. The straight run of the belt which is the front or ginning side, is about five feet and inclined to about twenty-five degrees from the perpendicular. The roll box is about three feet in diameter, as compared with about twelve inch diameter in the standard gin. The bottom portion of the roll box is flat,

or horizontal, and constitutes a seed screen. Its construction is similar to a gin saw cylinder, having a series of steel discs. These revolve toward the belt. The seed cotton is fed to the belt at its lower end and the hooked teeth on the belt carry seed cotton into the roll box and on to the top of the belt where it is discharged by centrifugal force; that is, the seed or partially ginned seed is thrown away from the belt at that point, while the lint, which has been engaged by the teeth, is carried around the top pulley and down to the third pulley, where it is doffed in the usual way—brush or air blast. The seed or partially ginned seed moves upward from the point of discharge and follows the curved crown of the roll box. This crown is screened and a suction of air is provided, which draws trash, motes, and other foreign matter through the screen. The partially ginned mass follows the screen and falls by gravity to the portion of the seed screen furthest from the gin belt, the seed screen, acting as live rollers, conveys the material back in contact with the toothed belt, where the operation is repeated. Seed falls through the seed screen when sufficiently cleaned, and is conveyed to the end of gin stand.

It is estimated by the inventor that seed and cotton moving upwardly with the belt at a speed of four thousand feet per minute have a pull of approximately two pounds per seed, and, therefore, leave the lint, which is engaged by the teeth. This is three times the resistance required to separate the lint from the seed. This powerful centrifugal action separates all foreign matter from the lint also. The extra large size of roll box provides escapement for all foreign matter through the screen. The gin, it is claimed, will gin cotton which has been submerged in water.

Every seed and every fibre is discharged from the gin immediately after the feeding ceases, preventing the mixing of seed or fibre from one bale to another. The gin handles the shortest cotton up to two and one-half inch staple, and no adjustment is necessary at any time. Being fed at the lower end of the belt, no object that would damage the teeth can be carried into the gin."

CARRYOVER IN U.S.A.

SUPPLY AND DISTRIBUTION IN U.S.—ALL GROWTHS

The prospective total supply of all cotton for the current season in the United States and distribution of all growths in that country for the first seven months are shown below with comparisons. Figures for 1937-38 are based upon the preliminary reports of the Census Bureau combined with rough estimates of imports and the "city crop" for twelve months. Ginnings for the twelve months of 1937-38 are based upon the December crop estimate reduced to approximate running bales, less ginnings prior to August 1 this season, and with allowance for probable ginnings prior to August 1, 1938. Comparisons for 1936-37 are the revised figures of the Census Bureau.

AMERICAN COTTON

	1937-38		1936-37	
On hand, August 1 ..		4,498,848		5,409,389
Ginnings—12 months ..	18,038,000		12,243,229	
Imports	170,000		248,748	
City Crop, etc. ..	100,000	18,308,000	25,331	12,517,308
Total Indic. Supply ..		22,806,848		17,926,697
Distrib. to February 28 :				
Exports—7 months ..	4,230,991		3,921,493	
Domestic Consumption				
—7 months	3,512,826	7,743,817	4,520,965	8,442,458
Indic. Supply—February 28		15,063,031		9,484,239
Exports—5 months ..			1,511,277	
Domestic Consumption				
—5 months			3,429,114	
Destroyed Season ..			45,000	4,985,391
Carryover—July 31 ..				4,498,848

SUPPLY AND DISTRIBUTION IN U.S.—AMERICAN.

In the table below, foreign items have been eliminated to show the supply and distribution of American cotton in the United States. As in the calculations above, the figures for 1937-38 are preliminary and include rough estimates on the supply for this season.

	1937-38		1936-37	
On hand, August 1 ..		4,387,332		5,336,428
Ginnings, City Crop, etc.		18,138,000		12,296,655
Total Indicated Supply ..		22,525,332		17,633,083
Distribution to February 28 :				
Exports—7 months ..	4,830,991		3,921,493	
Domestic Consumption				
—7 months	3,423,055	7,654,046	4,425,214	8,346,707
Indic. Supply—February 28		14,871,286		9,286,376
Distrib. after February 28:				
Exports—5 months ..			1,511,277	
Domestic Consumption				
—5 months			3,342,767	
Destroyed—Season ..			45,000	4,899,044
Carryover, July 31 ..				4,387,332

(Pearsall's News Bureau)

WORLD SUPPLY AND DISTRIBUTION FIGURES

The following tables, compiled by the New York Cotton Exchange Service, show the world supply and distribution of American, foreign, and all cottons, from August 1 to January 31 and from February 1 to

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□□□

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AMERICAN COTTON

July 31. Figures for American cotton are in running bales and for foreign cotton in 478-lb. bales :

	AMERICAN COTTON			
	1934-35	1935-36	1936-37	1937-38 (p)
Carryover, August 1 (a) ..	10,701,000	9,041,000	6,998,000	6,235,000
Production (b)	9,432,000	10,391,000	12,162,000	18,039,000
Supply Aug. 1—Jan. 31 ..	20,133,000	19,432,000	19,160,000	24,274,000
Consumption to Jan. 31 ..	5,665,000	6,130,000	6,420,000	6,029,000
Stock January 31 (a) ..	14,468,000	13,302,000	12,740,000	18,245,000
Added Supply (c) ..	114,000	69,000	168,000	
Supply Feb. 1—July 31 ..	14,582,000	13,371,000	12,908,000	
Consump. Feb. 1—July 31	5,541,000	6,373,000	6,673,000	
Carryover July 31 (a) ..	9,041,000	6,998,000	6,235,000	
Govt. Financed Stock— July 31*		3,237,000	1,693,000	

	FOREIGN COTTONS			
	1934-35	1935-36	1936-37	1937-38 (p)
Carryover, August 1 ..	6,839,000	6,031,000	6,651,000	7,078,000
Production	13,474,000	15,825,000	18,325,000	18,250,000
Total Supply	20,313,000	21,856,000	24,976,000	25,328,000
Consumption to Jan. 31 ..	7,295,000	7,398,000	8,650,000	7,979,000
Stock—January 31** ..	13,018,000	14,458,000	16,326,000	17,349,000
Consump. Feb. 1—July 31	6,987,000	7,807,000	9,248,000	
Carryover—July 31 ..	6,031,000	6,651,000	7,078,000	

	ALL COTTONS			
	1934-35	1935-36	1936-37	1937-38 (p)
Carryover, August 1 (a) ..	17,540,000	15,072,000	13,649,000	13,313,000
Production (b)	22,906,000	26,216,000	30,487,000	36,289,000
Supply Aug. 1—Jan. 31 ..	40,446,000	41,288,000	44,136,000	49,602,000
Consumption to Jan. 31 ..	12,960,000	13,528,000	15,070,000	14,008,000
Stock—January 31 (a)** ..	27,486,000	27,760,000	29,066,000	35,594,000
Added Supply (c) ..	114,000	69,000	168,000	
Supply Feb. 1—July 31 ..	27,600,000	27,829,000	29,234,000	
Consump. Feb. 1—July 31	12,528,000	14,180,000	15,921,000	
Carryover—July 31 (a) ..	15,072,000	13,649,000	13,313,000	

(a) Includes Government-Financed American spot cotton.

(b) Exclusive of ginnings of American cotton before August 1, but inclusive of city crop accumulations to January 31.

(c) Added supply February 1 to July 31, including United States city crop accumulations, and end-season ginnings minus cotton destroyed.

* Spot cotton only.

** Includes unpicked portion of crop.

(p) Preliminary.

Figures given above are in running bales for American cotton and in 478-lb. bales for foreign cottons.

COTTON PRICE PROSPECTS

Professor John A. Todd discusses in an article under the above title in the April issue of the *Empire Cotton Growing Review*, the fall in cotton prices over the last twelve months or so, and records the causes of the peak prices in March, 1937, and traces the causes of the reaction—the great gold scare in April, he says, proved to be the breaking-point of the boom and started a headlong decline of prices, which continued till October.

In March, 1937, the current contract in New York went out at 14.85 cents, while July Futures in Liverpool touched 7.99d. In October and November, January Futures in New York touched 7.50 cents, while Liverpool was down to 4.32d.

It may be hoped, Professor Todd states, that the decline in the prices of commodities in general has been checked, though on that point much depends on whether the feud between the President and Big Business has reached its last stage and whether confidence will return in America. As regards cotton, however, the position turns mainly on the question of how far crop restriction will be carried in the next few years and what the Government will do with their "ever-normal granary" of, say, 7,000,000 bales of cotton. If they are prepared to hold it more or less permanently, this season's unprecedented world supply may not prove to be so very burdensome after all, but previous experience of Government holdings has shown that their worst effect on the market was due to uncertainty whether, when, how much and at what price the Government would sell. At present there seems to be little ground for hope that we shall escape another period of similar uncertainty in the next few years.*

The other uncertainty is what effect a price of, say, $7\frac{1}{2}$ to $9\frac{1}{2}$ cents for American cotton will have on the production of Outside Growths in 1938.

* *The new Act limits sales after July 31, 1939, to 300,000 bales per month and 1,500,000 bales in any one year.*

COST OF PRODUCTION IN U.S.A.

According to information contained in a recent issue of "Crops and Markets," U.S. cotton costs for the 1936 crop, including rent, were estimated at \$27.13 per acre for lint and seed. From this amount was deducted the value of the seed, leaving a net cost of \$21.20 per acre. Although the net cost per acre was about 4 per cent. higher than in 1935, higher average yields in 1936 resulted in a slightly lower cost per lb. than in 1935.

The lowest cost is indicated for the river bottom areas where a yield of 363 pounds of lint (gross weight) was obtained. The highest cost was in the western dry areas where, largely because of drought, the average yield per acre was only 103 lb. Relatively high costs are also shown for the western hilly areas and for the Gulf Coast and Texas Black Prairie area, where yields also were reduced by the drought. In most of the remaining areas growing conditions were favourable, with the result that better than average yields were obtained and costs per lb. of lint were relatively low.

Cotton: Estimated Cost of Production, by Selected States and Regions, 1936¹

State and region	Gross cost per acre					Net cost of lint			
	Acres harvested	Production of lint in 500-pound gross weight bales	Average yield of lint per acre	Gross cost per acre					Per acre
				Preparation and planting	Cultivation and hoeing	Harvesting	Fertilizer and manure	Seed and weeding	
State	1,000 acres	1,000 bales	Pounds	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars
				Dollars	Dollars	Dollars	Dollars	Dollars	Cents
North Carolina	1,957	597	312	5.13	6.79	8.47	5.85	1.11	2.04
South Carolina	989	597	292	4.11	6.49	6.62	4.90	1.05	1.72
Georgia	1,366	597	289	4.35	5.49	5.52	4.18	1.07	3.47
Alabama	2,321	1,096	237	4.13	5.74	6.91	4.16	1.00	1.76
Tennessee	828	597	261	3.89	6.00	6.76	4.18	1.14	2.93
Mississippi	1,401	1,761	279	3.87	6.54	7.46	4.15	1.31	3.24
Louisiana	1,731	1,295	237	3.89	5.58	7.58	4.12	1.20	2.57
Arkansas	2,251	2,090	64	3.12	3.52	2.03	.20	.87	1.85
Oklahoma	11,597	2,933	126	2.85	3.90	3.29	.31	.87	1.65
Region									
Coastal Plain ⁶	4,675	2,577	276	4.16	5.70	7.07	4.21	1.09	2.19
Piedmont/hilly areas ⁸	2,425	1,156	234	4.21	5.86	7.36	4.23	1.13	2.49
River valley areas ⁹	3,182	1,378	283	3.83	6.70	11.84	4.93	1.03	2.23
Western hilly areas ¹⁰	5,618	1,534	136	3.62	5.11	3.90	1.06	1.00	1.47
Gulf Coast Prairie and Texas Black prairie ¹¹	5,138	1,420	138	2.98	4.02	3.60	.26	.94	1.57
Western dry areas ¹²	5,394	1,117	103	2.50	2.99	2.86	.05	.81	1.69
Irrigated areas ¹³	858	851	496	6.49	6.01	19.37	.36	1.03	5.60
United States ¹⁴	30,003	12,383	206	3.63	4.96	5.84	1.67	1.00	2.09

¹ Preliminary estimates. In computing averages, data were weighted by acreage harvested.² Obtained by dividing the production of lint in terms of 500-pound gross weight bales by the acreage harvested.³ Includes hauling and spreading manure.⁴ Includes picking and snapping cotton, hauling to gin, and hauling lint and cotton seed to local markets.⁵ Includes miscellaneous labour, irrigation (including water), dusting, picking sacks and sheets, crop insurance, use of implements, use of storage buildings, and overhead.⁶ Includes the lower and upper coastal plain of Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Louisiana, and the black prairie belt of Alabama and Mississippi.⁷ Includes the rolling and hilly uplands of Virginia, North Carolina, South Carolina, Georgia, and Alabama, which border the Blue Ridge Mountains on the east and south.⁸ Includes Tennessee exclusive of Lake County, the hilly cotton lands of northern Mississippi, northern Alabama, and northern Georgia, and western North Carolina.⁹ Include the principal bottom lands of the Mississippi, the Arkansas, and the Red Rivers.¹⁰ Include the hilly lands of Arkansas, Louisiana, southern Missouri, eastern Texas, and eastern Oklahoma.¹¹ Include the dry-land areas of Texas and Louisiana, and the black waxy prairie of Texas.¹² Include the irrigated cotton lands of California, Arizona, New Mexico, and Texas.¹³ Include the 16 States of Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Tennessee, Mississippi, Louisiana, Arkansas, Missouri, Oklahoma, Texas, New Mexico, Arizona, and California, which produced 99.9 per cent. of the United States cotton crop of 1936.¹⁴ Includes the 16 States of Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Tennessee, Mississippi, Louisiana, Arkansas, Missouri, Oklahoma, Texas, New Mexico, Arizona, and California, which produced 99.9 per cent. of the United States cotton crop of 1936.

CROP REPORTS

A cable received by Messrs. Comtelburo Ltd. from the American Cotton Crop Service, of Madison, Florida, on April 27, stated that the American crop had made only slow progress during the past week due to low temperatures and excessive rainfall. The crop in the Southern half of the Belt is about ten days late with very irregular stands in some parts.

Messrs. Weil Brothers, Montgomery, Alabama, in their semi-monthly Crop Letter dated April 15, 1938, state as follows :—

Farm work and planting, over the whole belt, were interrupted during the first half of April by generally unfavourable weather. Freezing temperatures, combined with rains in the West ; sub-normal temperatures with rains of flood proportions in the Central and Eastern belts have in many sections made for naught a good deal of the work done prior to April. Much of the land which was then in a good state of cultivation must be re-worked before any planting can begin ; considerable of the fertiliser in the Southern portions, put out prior to planting, has been lost and a large portion of the cotton which was up to a stand in South Georgia and South Alabama will have to be replanted. Conservatively, ten days to two weeks have been lost for the new crop and preparations range from two weeks late in the Western and Central belts to slightly below normal in the Eastern belt.

With reduced acreage the attitude of the farmer will be to increase his yield to the fullest extent. Larger farmers, even more than smaller ones, are disturbed over acreage limitation. Banks and merchants are making crop loans with unusual care and caution. In view of this, together with less fertilisation, present indications are that this crop will be produced at a somewhat lower cost. Generally, sufficient good seed are available for planting, with improved qualities being purchased wherever possible.

— — — — —
The American Cotton Crop Service communicate the following under the date of April 20, 1938 :—

The condition of the crop improved during the week ending April 18. Flood waters from the previous week's heavy rainfall were reported as draining off the farm land rapidly with soil conditions drying out thus enabling farmers to speed up planting operations. Moisture is abundant in practically all areas with an excess reported in the Eastern half of Texas, South-Eastern Oklahoma, the Northern half of Louisiana and in Arkansas. However, a good rain is needed about once every ten days following heavy downpours to keep the top soil from forming a crust. Abnormally low temperatures during the first half of April combined with excessive rainfall from middle Texas to the Atlantic coast resulted in much replanting and planting over in the Southern two-thirds of the belt. Some loss of fertiliser from heavy rain was also reported. The crop in the Southern third of the belt from East Texas Eastward is approximately ten days later than normal, but the advent of high day and night temperatures along with side dressings of nitrate of soda, will soon enable the plant to make up some of the late start. The greatest amount of replanting and planting over was reported by our crop reporters as occurring in the middle-third of the Belt. Chopping is under way in the Southern third of the Belt, but will not become general until warm day and night temperatures occur. Owing to the abundance of farm labour and the increase in the use of tractors, planting in the Northern half of the Belt should progress along normal lines. However, the recent set-back of the crop in the Southern half of the Belt will have a tendency to increase weevil damage.

— — — — —
Mr. C. T. Revel, of the firm of *Munds, Winslow & Potter* states as follows in the firm's weekly report dated April 22 :—

Weather conditions in the past few days have shown marked improvement with more settled conditions where dry weather is needed, and beneficial showers in parts of the Eastern Belt. In this latter locality good progress is reported. Considerable replanting has been necessitated in parts of Texas, but good results are expected on account of beneficial showers that have followed in the wake of this work.

Washington advices state that the national cotton acreage goal will be increased by approximately two million acres which would bring the total area close to 29,000,000 acres. This action was taken in the interest of small growers, as the original allotment was 26,384,000 acres.

Our observation of current indications convinces us that at present only one thing is clear : That nothing is yet clear about the effect of the spending programme with its adjuncts of desterilization and increase in excess reserves.

That this step was taken with a view to influence prices upward admits of no question. Governments faced by economic difficulties, almost without exception, proceed along the line of price lifting. Although increased income is listed as a desirability, price increment is advocated as the impulse to achieve this end.

When control or curtailment of production is utilised as a major force in price increase, it does not always follow that income is thereby augmented. For price times quantity is the measure of income.

The *American Cotton Crop Service* report dated April 27, 1938, contains the following statement :—

With the 1938 cotton acreage allotment approximately 28,300,000 acres, the interest of the trade will now centre on yield possibilities for 1938. The end of April offers a point on the calendar for comparisons of the relative earliness or lateness of the start of the crop in the southern two-thirds of the Belt. During recent years most of our high-yielding crops have had late starts. Therefore, since 1937, yield was of record breaking proportions, we compare the outlook at the end of April, 1937 with condition and outlook at the end of April, 1938. The more important features are listed below.

CROP OUTLOOK END OF APRIL, 1937

1. Planting somewhat retarded in southern two-thirds of Belt from East Texas to Atlantic coast by low temperatures and excessive rainfall.
2. Probably more replanting and planting over in southern half of Belt than in 1936.
3. "Stands" southern half of Belt mostly poor to fair.
4. Subsoil moisture, including Panhandle area of Northwestern Belt, average to above average.
5. Heavy increase in the use of fertilizer. Government loans have enabled all growers to fertilize heavily.
6. Low temperature delayed growth and germination in southern half of Belt during April.
7. Practically no winter temperatures control of weevil. However, due to drought in 1936 and early fall destruction of cotton plants by leaf worm relatively small number of weevils in winter quarters.
8. Acreage trend upward because of high prices.
9. Production trend upward due to heavy fertilisation.
10. Tractor increase leading toward mass production on wages basis.

CROP OUTLOOK END OF APRIL, 1938

1. Low temperatures, including much cotton killed by frost in southern third of Belt, and excessive rain fall East Texas to South Carolina have set crop back at least 10 days in southern half of Belt.
2. Decidedly more replanting and planting over in southern and middle thirds of Belt than in 1937.
3. Where planted since recent cold weather and heavy rains, stands reported excellent but very poor where planted early in April.
4. Subsoil moisture above average in practically all areas including the Panhandle.
5. As much fertiliser per acre as used in 1937. Government loans to farmers will enable all growers to fertilise.
6. Low temperatures delayed germination and killed most cotton to extreme southern edge of Belt during the month of April.
7. Practically no winter temperature control of the Weevil. Heavy weevil density entered winter quarters according to U.S. Department of Agriculture from East Texas to Atlantic coast in southern half of Belt.
8. Between 28 and 29 million acres indicated by allotment.
9. Production trend may show slight decline but yield expected to be in cycle of high yields such as have been experienced during the past five years.
10. Tractors becoming more numerous and farmers preparing land better and making heavy use of wages labour.

A study of our comparisons at the end of April, 1937, shows the 1938 crop prospect to have striking similarities—the chief difference being heavy damage by frost in 1938 to cotton in southern half of Belt. Weevil damage is expected to show some increase otherwise the start of the crop in 1938 conforms very closely to the start of the 1937 crop.

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EGYPTIAN COTTON

MARCH GINNING REPORT

According to the official returns of the Egyptian Ministry of Agriculture, 853,000 cantars of cotton were ginned, in March of this year, as compared with only 382,000 cantars in March last year. Total ginnings to the end of March were 9,186,000 cantars, as compared with 8,778,000 cantars at the corresponding stage of last season. This year the permitted period for ginning has been extended to May 20. The following table shows the position as regards ginnings :—

(000's omitted—in cantars.)					
1937-8			1936-7		
		Ginned by Mar. 31	*Esti- mated crop	Ginned by Mar. 31	Actual crop
Sakellaridis	..	411	517	501	520
Other long staples	..	2,708	3,044	2,292	2,336
Medium staples	..	143	154	145	147
Short staples	..	5,924	7,081	5,840	5,901
Total	..	9,186	10,796	8,778	8,904

* Official estimate issued December 8.

In spite of the fact that the estimated crop this season is 1,892,000 cantars more than last season's, ginnings to the end of March were only 408,000 cantars more, and arrivals at Alexandria were only 246,000 cantars more. Exports from Alexandria so far this season have fallen short by some 570,000 cantars of those at the corresponding date last season, and stocks at Alexandria are 784,000 cantars more.

SAKHA 4 IMPROVED

The following has been communicated to us by the Botanical Section of the Ministry of Agriculture, Giza, Egypt.

The attention of exporters and their customers is drawn to the high spinning quality of cotton grown from the new Sakha 4 seed now issued

from the Botanical Section of this Ministry, and known as *Sakha 4 Improved*. In agricultural characters the *Sakha 4 Improved* plant is closely similar to the original *Sakha 4*, being equally resistant to wilt, and the cotton also appears similar by hand tests: but in spite of this, it is distinctly superior in spinning quality. The progressive quality improvement in this variety is shown in the following spinning tests on cotton grown from the seed issued in recent years and this year.

Seed issued in				Lea Strength 60's Carded Twist Yarn (a)	Counts Twist Yarn (b)	Product
Ordinary <i>Sakha 4</i>	..	..	1934	2590	2575	
Partly Improved <i>Sakha 4</i>	..	..	1937	2765	2745	
<i>Sakha 4 Improved</i>	..	..	1938	2950	2940	

(a) 1937 Crop grown at Sakha. (b) 1937 Crop grown at Ibshan.

Sakha 4 Improved is found to give a satisfactory performance even at very fine counts, as shown by the following spinnings in 155's combed, comparing it with Sakel of equal grade:—

				Lea Strength 155's Twist Yarn, 17% combed	Counts	Product
Improved <i>Sakha 4</i>	1975	
Best quality Sakel	1900	

All the above tests have been made on cottons grown in Ministry of Agriculture Chequers under strictly comparable conditions. Samples of *Sakha 4 Improved* have also been taken from the commercial lots still available for sale from the State Domains 1937 crop; these lots (grade Extra, or Fully Good/Extra) are much superior in spinning quality to the *Sakha 4 FG* and Sakel FG normally obtainable at Alexandria.

				Lea Strength 60's Carded Twist Yarn	Counts	Product
<i>Sakha 4 Improved</i>						
Domains Extra	2870	
Domains FG/Extra	2790	
Average Commercial <i>Sakha 4 FG</i>	2540	
Average Commercial Sakel FG	2615	

Up to 1937, the new *Sakha 4* had been grown only by the State Domains, but beginning with the 1938 crop some of the Improved or partially improved seed will be in the hands of private cultivators and all available seed has been already taken up; production of this cotton is now in a position to be rapidly increased if it is found to be in demand by spinners.

EGYPTIAN FUTURES CONTRACT BASES

The following article appeared in a recent issue of the *Manchester Guardian Commercial* :—

Thanks to careful seed selection, increased efficiency and cultivation generally, and (in 1935) the enactment of stringent anti-mixing laws, the quality of Egyptian crops has improved progressively in recent years, but though this has called for an appropriate revision of the Alexandria futures contract bases the Egyptian authorities have so far taken no steps to satisfy that requirement.

The basic contract grade of any cotton should theoretically represent the average of all the grades produced, the grades grouped in the tenderable range (of which the basic grade is the mean) being supposedly those which are normally the most abundant. This is emphatically not true in any of the three contracts now in use at the Alexandria Futures Exchange because the basic grade of each of them is, in fact, scarce, both absolutely and in relation to the higher grades, and the effect this season again is to maintain the spot bases at abnormally high parities with futures prices and to induce a marked tendency for the near months to rule at premiums over the later options, to the prejudice of traders and growers using the market for hedging purposes.

When, in recognition of the sustained improvement in the average grade of the crops, Good/Fully-Good was in 1935-6 brought into the range of tenderable grades (Good having until then been the highest grade in respect to deliveries of which allowances were granted), Fully-Good-Fair ceased to represent the mean between that grade and Good-Fair (the lowest grade admitted for tender), the actual mean being automatically raised to a grade intermedite between Fully-Good-Fair and Fully-Good-Fair/Good. But adjustment of the basic contract grade by a quarter of a class was obviously impracticable. Many traders, however, were then, and still are, strongly of the opinion that the contracts should be based on the grade Full-Good-Fair/Good, or even on Good, and the official ginning returns for the three months ended November 30 lend emphatic support to this view. The Ministry of Agriculture's analysis of the grades ginned in that period shows a proportion of roughly 14 per cent. up to and including Fully-Good-Fair, 86 per cent. consisting of cotton graded above Fully-Good-Fair. Cotton graded above Fully-Good-Fair up to and including Good represents approximately 36 per cent. of the total ginnings, while roughly 50 per cent. of the total consists of cotton graded above Good. It is clear, therefore, that the average of the grades ginned is somewhere in the neighbourhood of Good.

It must, of course, be remembered that in the early ginnings the top grades are invariably in a higher ratio with the total than later in the season, and that from now onwards the quantity of cotton above good in the monthly returns must be expected to increase at a progressively diminishing rate relatively with that of the medium and lower grades, but it may be safely assumed, nevertheless, that the average of the whole crop will

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certainly not fall below Full-Good-Fair/Good in any of the varieties tenderable against futures contracts.

In February, 1934, the Spot Exchange Commission put forward a proposal for the revision of the grade bases of both Sakellaridis and Uppers to Fully-Good-Fair/Good, but the Government rejected it on the ground, apparently, that the change might not have in actual practice the theoretically logical effect of raising the contract prices, and might, on the contrary, result in a depreciation of values generally. Another project for the fundamental revision of the then existing contracts was submitted to the authorities in the summer of 1935, and this again contained a recommendation that the grade bases should be raised. But the proposal was once more ignored—presumably for the same reason—though the tenderable range was subsequently extended.

The objection that values might be depressed following the adjustment advocated by the Spot Exchange Commission is hardly a material one, because if, as the result of a misdirected speculative movement, a depreciation did occur, the corrective would soon be applied by an expansion of trade demand.

Opposition rests upon the arguments that the price of futures would not necessarily reflect the enhanced intrinsic value of a contract based on a higher grade and that the price of spot might be correspondingly depressed. These assumptions we believe to be groundless. The first ignores the principle which relates spot to futures. Since the buyer in a spot contract for future delivery knows exactly what cotton he is going to receive, whereas the buyer of futures may be delivered either the basic grade itself or any other of the grades within the tenderable range, the trader is always prepared to pay an appreciably higher price for the spot than for the futures. But the fact that a futures contract is finally implemented by a transfer of actual cotton from the seller to the buyer must logically bring its price at maturity into close relationship with the spot price of its basic grade, and in practice wide disparities only occur when prompt demand for that grade greatly exceeds the available supply, or conversely when offerings of it greatly exceed the existing demand. The present position is that the available supply of Fully-Good-Fair, the basic grade, is extremely small. Consequently the seller of futures as hedge against a spot interest in Good, for example, may find that he can only tender at serious loss owing to the high price of Fully-Good-Fair (which is dangerously susceptible to manipulation), while the buyer of futures is practically certain *not* to have the basic grade delivered to him on tender, though delivery of it is assumed in the price at which he has bought. The contract thus rests at present upon a false basis. It is the contention of the two Alexandria Exchanges that if Good—the grade in most abundant supply of Fully-Good-Fair—the basic manipulation directed against the seller of futures would be impossible, while the buyer of futures would have every prospect of receiving on tender the cotton he bargained for. The contract would then have a solid commercial basis; it would provide a sound hedge against spot holdings as well as against forward sales; and as it would represent a grade currently in liberal

supply and in broad demand, a close alignment between its price and the price of spot would be assured.

THE SPOT MARKET.

The fear that the price of spot cotton might be depressed following the change is, we believe, equally unfounded. Spot cotton is marketed at the price at which the producer is disposed to sell it and the consumer to buy it, quite irrespective of the price of futures. It is true that nowadays the bulk of the growers' sales are made "on basis futures" (that is to say, the points to be allowed on or off futures are established at the time of sale, while the futures price itself is left to be fixed within a stipulated period at the option of the seller), and that in these circumstances the price of futures is a determinant in the price which the grower ultimately gets for his cotton. But although in an unfixed sale the price at which the cotton is finally invoiced depends upon intervening movements in the futures market (in relation to which the grower stands as a bull until he has fixed), it is manifest that, however long fixation is deferred, the futures price which was ruling at the moment the business was originally arranged, plus or minus the points allowed, must have been approximately the same as the price which would then have been obtainable in an outright spot sale, and therefore represented no less accurately the equation of the supply of the cotton to the demand for it at the time. That price would be neither raised nor lowered if Good were made the basis of the futures contracts, and any momentary depreciation resulting from a misdirected speculative movement would be very soon corrected by an expansion of trade demand. A point which is much stressed by some critics of the proposed change is that it would rule out the possibility of periodical advances in the spot price of Fully-Good-Fair due to manipulation, but as growers can rarely profit by such movements this consideration is irrelevant.

THE GROWER'S INTEREST.

One important result which might be expected to follow from a revision calculated to make tendering against futures hedges a commercial proposition would be the establishment of the theoretically normal relationship between futures months, in which near options would stand at the discount under succeeding ones which would represent the cost of carrying cotton over the intervening period. It is sometimes alleged that the maintenance of near month premiums is in the interests of the cultivator, as it enables him to fix advantageously—particularly on those occasions when speculative exploitation of the difficulty of tendering forces prices temporarily up to artificial levels—and also gives him opportunity of deferring fixation from one month to another (thus keeping his bull interest alive) without payment of carrying charges to the buyer. But the perpetuation of a condition which theoretically favours grower speculation cannot seriously be advocated on that ground, especially as in actual practice growers seldom if ever reap any reward in compensation for the grave risks which they run. The consideration

which should really weigh with the cultivator is this. When on the other hand, the relationship of the futures months permits the transferring of hedge positions from one option to the next at a difference covering the cost of carrying cotton, exporters accumulate stocks when overseas demand is sluggish, thus ensuring a ready market for actual cotton at all times.

THE MONEY CROP OF EGYPT

(Extracted from an article which appeared recently in the Egyptian Supplement of the *Manchester Guardian Commercial*.)

The method adopted for marketing the crop depends largely on the size of the producer's holding. Of the land-owners in Egypt 1.4 per cent. possess one-half of the total arable area, while 70 per cent. own only one acre each or less. The large estate owner can arrange, if he so desires, to market his crop direct; but the small holder must have recourse to an intermediary, such as a cotton merchant who buys cotton in small lots locally, superintends it in bulk through the ginning process, and ultimately sends it to Alexandria for sale for his own account or for account of the bank which finances him. In addition, there is the exporter, who often prefers to buy direct in the interior; direct buying by exporters has tended to increase in recent years, and we now find exporters who operate their own ginning factories in the interior.

These different ways of marketing involve corresponding methods of finance, which may be classified in three categories—producer, merchant and exporter finance. Banks advance directly against cotton in shoonahs (or “go-downs”) in the interior, in ginning factories, in course of transit, and in warehouses or pressing factories at Alexandria. They may further finance the crop indirectly in any stage by advancing to exporters and others against some acceptable security other than cotton. In the final stage, an exporter usually ships cotton against three months' documentary bills and may subsequently desire his bank to discount these bills in Alexandria (bills being drawn for the most part in sterling) in order to provide the funds with which to effect further purchases of cotton. Many of the export houses can command fine bill rates.

The financing of the crop in the interior becomes of importance in September, and in normal years a large part of the crop has been disposed of by December. Thus in three months a fair proportion of the crop (valued last season at about £E.30,000,000) must be financed by means of an expansion of cash or bank credit—largely the former.

The value of the crop depends to a great extent on the world price of cotton in general and on American prices in particular. The consequent fluctuations in the value of the total crop and the relation between selling price and fixed costs of production have a determining influence on the standard of economic life and on the financial condition of the country. Variations in the value of the crop are illustrated by the following figures :

VALUE OF ARRIVALS OF COTTON IN ALEXANDRIA

		Millions of £E.
1930-31	..	19.0
1931-32	..	13.2
1932-33	..	12.1
1933-34	..	19.3
1934-35	..	19.5
1935-36	..	22.6
1936-37	..	25.5

The low value of cotton during the depression period rendered the payment of mortgage interest ruinous to the peasant, and since 1933 various arrangements have been made—at the instigation of the Government—to alleviate the burden of fixed charges. In addition, land tax has recently been reduced, the estimated saving to the producer (and corresponding loss to the Treasury) being £E.1,000,000.

THE FUTURE OF GIZA 7

Mr. C. H. Brown, of the Cotton Research Board, Giza, in an interesting article entitled "Exit Giza 7?" published recently in the Egyptian Supplement of the *Manchester Guardian Commercial*, comments upon the possibility of the future displacement of Giza 7. He states that the diversity of characters of Egyptian cotton is sufficient to give the possibility of a large series of recombination of existing characters and in addition new standards are being set. For example, Giza 12 has a larger boll than any variety previously known in Egypt, and Giza 26 is superior in yarn quality to any previously existing variety. In the same way, although Ashmouni has always had the highest ginning outturn of commercial varieties, several strains now exist superior to Ashmouni in this respect. A new character, large seed, is now being selected for, since this has been found to give better germination and stronger growing plants. Maximum yield is, of course, obtained where prolific fruiting is combined with a large seed, high ginning outturn, and a large boll, and the combination of all these characters is the present objective.

The variety Giza 7 was the first of the Giza selections to be a large-scale commercial success. Considering Egyptian varieties only, however, Giza 7 is not now looked on as a high quality cotton, but rather as a medium quality, as there is now a group of top quality cottons for the speciality market. Giza 26 and the present improved strains of Sakha 4 are the best of these, both of them longer and finer than Sakel ever was, and Giza 26 unquestionably stronger as well. These are necessarily speciality cottons, for a large crop of them would probably easily depress the price to a point where they were unremunerative to the grower, but they certainly should maintain the reputation of Egyptian cottons for quality. Giza 26 is probably the best where maximum strength is required, and Sakha 4, owing to its light colour and lustre, better where finish and appearance are more important.

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Between Giza 7 and these top quality cottons lies Giza 29, a new variety, propagation of which is now beginning. This is likely to prove most important in the future, as it combines the high yield of Giza 7 with a better quality than that variety, though of course not equal to the best quality varieties just mentioned. It is too early yet to say what place in the Egyptian cotton trade may be attained by Giza 29, but that it will every year for many years to come be increasingly important is quite assured.

All these good quality varieties, however, have to meet the competition of new types of medium-staple growths giving exceptionally high yield. Several of these strains have been selected and are now under test. All are better than Ashmouni, but lower than Giza 7 in quality, and by reason of either disease resistance, earliness, large boll, high ginning outturn, prolific flowering, or a combination of several of these qualities, are most attractive from the agricultural point of view. Giza 12 was the first of this new group. It has been in propagation now for two or three years, and is just becoming commercially important, being liked by the grower, and attractive, as a cheap medium-staple Egyptian variety, to spinners.

It will be clear that, beaten in yield per acre by Giza 12 and in quality by Giza 29, Giza 7 will not for long be able to retain its present dominating position in the quality market. Coming at a time when Giza 7 has just succeeded in being completely accepted by all concerned, the increased growth of these other newer varieties is bound to cause a certain amount of dislocation and inconvenience to users. It should, however, be pointed out that nothing in the nature of a change of variety is ever forced on the grower by the Egyptian Government, and any change is therefore clear proof of the increased general profitability of the new variety. If a dying variety were ever of real special value to spinners, it would be kept in cultivation by offering growers a high price for it, but it will in the long run always prove to be not worth spinners' while to do this. The thorough testing of varieties at the Giza Spinning Test Mill before propagation is a guarantee that there really is value in these new growths, and any sentimental value which Giza 7 may now be building up for itself is not likely in the long run to be able to save it any more than a similar attachment was able to save Sakel.

The real difficulty in our cotton-breeding work is that no sooner have we got a new variety commercially launched than there appear other new ones which are better. This is especially true at the moment of the medium quality group, of which Giza 12 is the type. Giza 12 itself, in comparative tests in recent years, has shown itself unquestionably the best yielding variety grown in the Delta. Similar tests of the newest selections make it quite clear that Giza 12 can be beaten in yield, and it only remains to satisfy ourselves which is the best of these newer strains. It may be of interest that the one that appears best at the moment is a cross between Giza 7 and Giza 12, this indicating the way in which any established variety of merit is immediately used by the Botanical Section as the basis for crosses in which it is hoped to combine the desirable qualities of the parents or as often happens, discover new qualities in some way superior to either parent.

Egyptian cotton crops of the future will be larger. The reclamation of new land in the North Delta, the conversion to perennial irrigation of basin land in the south, which does not at present grow cotton, and the improvements in irrigation and manuring of established cotton land, all work hand in hand with the new varieties to ensure larger total crops. Being at the top end of the world's crops in quality, any size of crop is always saleable by, if necessary, a slight closing down of the premiums on American, so that the Egyptian cotton trade need have no fear of the future as long as cotton is used at all. It must be remembered that the total demand for Egyptian cotton is built up from a large number of special uses, which have their individual needs, and it is hoped that among the new Giza varieties each special trade will always find something to meet its requirements.

THE CREATION OF A COTTON ECONOMICS COUNCIL

We publish below extract from an article which recently appeared in an Egyptian paper.

"We have already mentioned the Government's praiseworthy efforts to protect cotton growing. Similar efforts are likewise being made by the Giza Cotton Research Board, the Royal Agricultural Society, the Ginning Section of the Federation of Egyptian Industries, the Board for the Prohibition of Cotton Mixing, and, as far as trade and exporting interests are concerned, by the Minet el Bassal Bourse Commission and the Alexandria Cotton Exporters' Association. However, it appears to us that all these efforts, whilst all aiming at the same objective, fail to give the desired maxima results owing to lack of a directive organisation. This therefore renders imperative the co-ordination of these efforts by the creation of a Cotton Economics Council, composed of members nominated by the various groups and associations interested in the production, the manipulation and the trading of cotton from the field to the ship."

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EXPORTS OF COTTON

The exports for the first half of the season by individual firms were as under :—

	Season 1937/38	Season 1936/37	Season 1935/36	Season 1935
Ah. A. Farghaly Bey	50,002	48,307	40,703	31,027
Peel & Co. Ltd.	46,626	73,667	61,884	58,125
Levy, Rossano & Co.	39,911	35,666	23,878	14,838
Anderson, Clayton & Co.	38,028	33,628	47,038	32,590
Alexandria, Commercial Co. S.A.	37,675	43,237	45,676	36,145
Carver Bros.	35,389	44,747	43,140	30,005
Pinto & Co.	33,784	25,341	20,908	28,108
Cicurel & Co.	33,000	33,313	31,361	21,925
Choremi, Benachi Cotton Co. ..	28,354	26,554	23,536	27,313
Société Misr	26,052	24,139	21,400	28,991
Salvago, C. M. & Co.	25,901	27,057	18,622	11,221
Eg. Produce Trading Co.	25,426	31,400	27,568	22,670
Reinhart & Co.	24,886	36,554	29,952	25,284
Planta, J., & Co.	23,119	16,248	24,671	20,784
Rodocanachi & Co.	20,682	26,015	15,270	13,873
Kupper, H.	18,030	20,454	20,725	19,394
Alex. Cotton Trading Co.	17,057	13,231	6,817	—
Escher, W.	16,185	10,361	6,588	5,897
Fenderl & Co.	15,997	12,191	15,626	17,539
Union Cotton Co. of Alexandria ..	12,244	11,937	10,516	10,357
Rolo, J., & Co.	12,206	8,746	16,824	16,676
Sté Cotonnière d'Egypte	11,988	14,470	14,600	12,257
British Egyptian Cotton Co. ..	10,116	12,846	18,687	20,135
Anglo-Continental Cotton Co. ..	8,972	8,632	9,697	6,670
Casulli, M. S., & Co.	8,623	6,309	4,351	5,743
Sakellarios & Co.	8,319	8,250	5,764	10,385
Joakimoglou, C. Z., & Co.	8,054	5,753	4,108	2,691
Getty, W., & Co.	7,134	3,269	10,050	7,921
Aghion, Riquez & Co.	7,018	8,663	7,349	5,888
Elia Bondi	6,578	8,658	8,397	6,161
Japan Cotton Trading Co.	5,837	33,353	16,407	17,899
Eastern Export Co.	5,571	8,448	7,546	6,088
Comptoir Cotonnier d'Egypte ..	5,442	5,176	5,034	2,797
Eg. Cotton Ginners and Exporters	5,272	6,566	6,908	6,277
Daniel Pasquinelli & Co.	5,004	6,588	5,801	6,606
Francis Levy & Co.	4,703	8,634	6,638	6,136
Engel Adrien & Co.	4,699	4,930	3,435	5,254
Cotonnière d'Alexandrie	4,573	6,504	—	—
Delta Cotton Co.	3,776	3,875	—	—
Elia, D. & A., & Co.	3,622	2,903	2,193	873
Riches, Stabile & Co.	2,971	7,277	5,421	4,495
Bibace & Co.	2,897	6,422	6,980	5,399
Yazgi, A. & W.	2,358	4,415	4,465	4,267
Cambas, P., & Co.	2,008	1,708	1,444	2,456
Camilleri, Hector E., & Co. ..	1,147	669	—	—
Sellas, André, & Co.	248	1,153	—	—
Lumbroso, M., & Co.	183	425	378	182
Others	1,419	6,893	19,494	28,160
Total Bales	718,986	800,582	727,850	647,502
Weighing net Crs. ..	5,300,313	5,882,173	5,349,457	4,876,648

MARKET REPORTS

The weekly report of the *Alexandria Commercial Co. (S.A.)*, dated April 21, contains the following :—

SAKEL.—Due to an almost complete lack of interest, both commercial and speculative, this contract has again been quiet and neglected. However, present prices are in our opinion very cheap, and an appreciable reaction will be certain at the first signs of a revival in the demand for long staple cottons.

SPOT.—This week we only had three sessions owing to the Easter holidays. The total turnover amounted to about 7,200 bales of which we estimate 3,000 bales Ashmouni, 1,100 bales Zagora, 2,300 bales Giza 7, 200 bales Sakel and 600 bales other varieties.

ASHMOUNI.—Showed a better tendency during the last session, especially for the top grades. Premiums however did not vary to any extent.

ZAGORA.—Had a fair market but little business was recorded in cotton grading below Good. Premiums were unchanged.

GIZA 7.—Was also in better demand towards the end of the week, but buyers showed no interest in the lower grades. Premiums for the top grades were a little firmer.

SAKEL.—Had a very poor market.

OTHER VARIETIES.—The top grades of Maarad were in good demand and a small turnover was registered in Giza 12 and Sakha 4.

Messrs. Reinhart & Co., Alexandria, in their report dated April 29, 1938, state as follows :—

SPOT MARKET.—There has been a more active demand at Minet-el-Bassal with daily sales averaging over 2,000 bales.

Interest focussed on Giza 7, premiums of which are well sustained. Mainly medium and higher grades were asked for, but also a few hundred bales of top grade cotton were sold. Stocks of medium grades of Giza 7 are getting small.

A good demand for Maarad has turned up and there are inquiries for Sakha 4 as well. These cottons look now very cheap.

There is a regular business done in Uppers, where the higher grades are particularly favoured. Premiums have a rising tendency. Relatively little is done in Zagora ; medium grades of this variety are scarce.

Total sales for the period under review amount to 14,314 bales of which 5,101 bales Uppers, 4,954 bales Giza 7, 1,791 bales Zagora, 1,292 bales Maarad, 584 bales Sakellaridis, 404 bales Sakha 4 and 188 bales others.

ALEXANDRIA STOCKS are returned with 2,701,271 cantars as against 1,761,034 cantars at the same time last year.

EXPORTS since the beginning of April amount to 62,614 bales as against 82,678 bales during the same period in 1937. Respective figures from September 1 to date are 883,879 bales this season and 995,977 bales last season.

NEW CROP. UPPER EGYPT.—A spell of hot weather has passed over that part of the country, but the young cotton plants have not benefited therefrom, as strong, sandy winds from the South have blown for some days.

LOWER EGYPT.—Warmer but windy weather has prevailed in the Delta. Nights have been cool, but the weather has been favourable to the crop. The young plants grow steadily, but they are still smaller than at the same time last year. The fields have a more satisfactory aspects than two weeks ago.

THE SITUATION IN EGYPT.

Messrs. Levy Rossano in their market report dated April 25, write as follows :—

With the electoral campaign over and following a succession of holidays the country has again subsided to its usual calm. While the country may be quiet politically, two items of much interest to cotton trade circles have recently made their appearance. The first is the proposal by the Alexandria Spot Exchange Commission that GOOD should be substituted for FULLY GOOD FAIR as the basic grade of contracts in use on the Futures Exchange. This now awaits the decision of the Government. The second is the Egyptian Government's new cotton piece goods tariff, which has caused considerable perturbation in Lancashire, so much so that the Lancashire cotton industry has passed a resolution to the Board of Trade in England most strongly protesting against the imposition of the tariffs, which will mean that at least half the goods which Lancashire has recently been selling to Egypt will become too dear and accordingly will no longer be sold. The duty on heavy cotton piece goods, comprising two categories over 140 grms. per sq. metre, have been increased by as much as 80% which, on 1936 figures, would affect 40% of the total imports from the United Kingdom, and 35% for 1937. On light cotton piecegoods, i.e., on six categories under 140 grms. per sq. metre, the duties have been increased by an average of 70% which, on the 1937 import figures, affects between 55 and 60% of the United Kingdom textile trade with Egypt and, with heavy goods, no less than 90%. Lancashire will also be hit by the imposition of an increased duty of 100% on yarns.

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East Indian Cotton



FINAL GENERAL MEMORANDUM ON THE COTTON CROP OF 1937-38

This memorandum is based on reports received from all the provinces and States and refers to the entire cotton area of India. It deals with both the early and late crops of the season. Information regarding the late crops in certain tracts, chiefly in Madras, Bombay, Sind and Hyderabad, is not, however, complete at this stage. A supplementary memorandum will therefore be issued at a later date, as usual, containing full and final figures for the above-mentioned tracts together with revised estimates, if any, for other areas.

The total area now reported is 25,334,000 acres, as against 24,590,000 acres, the revised estimate at this date last year, or an increase of 3 per cent. The total estimated yield now stands at 5,407,000 bales of 400 lbs. each, as compared with 6,008,000 bales (revised) at the corresponding date of last year, or a decrease of 10 per cent.

The condition of the crop, on the whole, is reported to be fairly good.

The detailed figures for each province and State are shown below :—

Provinces and States	Acres (thousands)		Bales of 400 lbs. each (thousands)		Yield per acre (lbs.)	
	1937-38	1936-37	1937-38	1936-37	1937-38	1936-37
Bombay (a) ..	5,884	5,890	1,203	1,062	82	72
Central Provinces and Berar ..	4,047	3,952	711	789	70	80
Punjab (a) ..	3,985	3,691	1,316	1,021	132	208
Madras (a) ..	2,512	2,461	489	533	78	87
United Provinces (a)	581	700	197	175	136	100
Sind (a) ..	1,043	976	391	433	150	177
Bengal (a) ..	94	94	31	28	132	119
Bihar ..	43	31	8	6	74	77
Assam ..	45	36	24	13	213	144
Ajmer-Merwara ..	37	34	15	12	162	141
North-West Frontier Province ..	22	21	4	4	73	76
Orissa ..	8	8	1	1	50	50

(a) Including Indian States.

FINAL GENERAL MEMORANDUM—*continued.*

Provinces and States	Acres		Bales of 400 lbs.		Yield per	
	(thousands)		each		acre (lbs.)	
	1937-38	1936-37	1937-38	1936-37	1937-38	1936-37
Delhi	2	2	1	1	139	160
Hyderabad ..	3,497	3,076	560	499	64	65
Central India ..	1,340	1,414	137	203	41	57
Baroda	914	871	164	137	72	63
Gwalior	667	714	76	106	46	59
Rajputana	528	534	68	73	52	55
Mysore	85	85	11	12	52	56
Total	25,334	24,590	5,407	6,008	85	98

A statement showing the present reported estimates of area and yield according to the recognised trade descriptions of cotton, as compared with those of the preceding year, is given below.

TRADE DESCRIPTIONS						
Descriptions of Cotton	Acres		Bales of 400 lbs.		Yield per	
	(thousands)		each		acre (lbs.)	
	1937-38	1936-37	1937-38	1936-37	1937-38	1936-37
Oomras—						
Khandesh ..	1,317	1,295	327	253	99	78
Central India ..	2,007	2,128	213	309	42	58
Barsi and Nagar ..	2,337	1,918	422	338	72	70
Hyderabad-Gaorani ..	949	841	139	141	59	67
Berar	2,851	2,713	501	568	70	84
Central Provinces	1,196	1,239	210	221	70	71
Total	10,657	10,134	1,812	1,830	68	72
Dholleras	2,481	2,743	474	436	76	64
Bengal-Sind—						
United Provinces	581	700	197	175	136	100
Rajputana	565	568	83	85	59	60
Sind-Punjab	2,628	2,495	871	1,208	133	194
Others	57	45	11	9	77	80
Total	3,831	3,808	1,162	1,477	121	155
American—						
Punjab	1,772	1,626	601	900	136	221
Sind	652	569	240	251	147	176
Total	2,424	2,195	841	1,151	139	210
Broach	1,450	1,436	327	326	90	91
Coompta-Dharwars	1,100	1,120	145	159	53	57
Westerns and						
Northerns	1,811	1,597	183	173	40	43
Cocanadas	143	160	25	28	70	70
Tinnevellies	530	564	124	145	94	103
Salems	194	182	36	36	74	79
Canabodias	569	514	223	206	157	160
Comillias, and other						
Sorts	144	137	55	41	153	120
Grand Total	25,334	24,590	5,407	6,008	85	98

The area sown with cotton in Burma is reported to be 550,000 acres, as against 519,000 acres last year. The yield is estimated at 154,000 bales, as compared with 113,000 bales last year. The quantity likely to be exported from the present crop is estimated at 146,000 bales.

THE INDIAN CENTRAL COTTON COMMITTEE AND ITS WORK

*By SIR BRYCE BURT and D. N. MAHTA
in the "Empire Cotton Growing Review"*

As is now well known, the Indian Central Cotton Committee's activities extend to all branches of cotton improvement in India. The Committee aims at supplementing, and not supplanting, the work of the Agricultural Departments in the cotton-growing provinces and Indian States. Though, as a matter of convenience, the Committee has laid down certain lines of demarcation regarding the investigations which it considers appropriate for its grants, the general policy has been to give assistance in the directions where it is most needed in the carrying out of a co-ordinated policy of cotton improvement. In consequence one cannot always attribute the credit for particular advances to the Committee or Departments with any precision. Broadly it can be stated that the marked developments in Indian cotton cultivation, which have taken place during the last few years, have resulted in a very large measure from the work of the Provincial Departments of Agriculture and that much more has been done than would have been possible had no assistance from the Committee been forthcoming. In short, the latter's relations with the Agricultural Departments can best be described as symbiosis. For a considerable period, the Committee restricted its grants to agricultural research, but in 1930 it was decided that the time had come to add its support to the efforts already being made to bridge the gap between the experiment station and the cultivator and to supplement

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the funds which the Agricultural Departments were devoting to the introduction of improvements into agricultural practice. Special attention was devoted to seed introduction schemes.

The agencies employed by the Committee for its research work have varied little in character since 1923 though they have grown in number. It continues to maintain a central Technological Laboratory at Bombay, the work of which is now well known ; it also provides a large proportion of the funds of the Indore Institute of Plant Industry, where Mr. Hutchinson's recent work on the Asiatic cottons was carried out ; and it continues to make grants to Provincial and State Departments of Agriculture for specific purposes.

The Committee has not stopped at the production of better cotton, but from its inception has devoted special attention to better marketing (in the widest sense of the word), to the prevention of adulteration and other abuses and to many other problems connected with the cotton trade of the country. Including as it does representatives of growers, agricultural officers, traders, spinners and manufacturers, it has been an invaluable forum for the discussion of many problems of general concern. The ever-increasing understanding which has arisen from the association of leading commercial representatives with growers and research workers has led to developments which at one time seemed impossible, whilst as an authoritative body to advise the Central and Provincial Governments on the important matters of cotton policy the Committee has attained an outstanding position. It may be stated without hesitation that much of the success has been due firstly to the way in which leaders of the commercial community, both Indian and European, have given freely of their time and knowledge to the Committee's work and to its day-by-day administration, whilst the readiness with which trade associations, particularly the East India Cotton Association, have taken action on recommendations designed to benefit the cotton grower, has made its task much easier. A further advance was made when the Committee was given the right to nominate two representatives of the cotton growers to the Board of the East India Cotton Association.

In reviewing briefly the results of these co-operative efforts to improve Indian cotton it may be stated without hesitation that the last fifteen years have seen a marked change in the character of the Indian cotton crop, particularly in the percentage of short and medium staple.

CROP REPORT

Messrs. Volkart Brothers, Winterthur, Switzerland, report as follows under date of March 29, 1938 :—

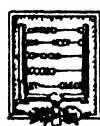
We have not issued a fresh detailed crop estimate since our report of December 7, but have contented ourselves to point out in a general way a reduction of 100,000 bales each for Omras and Punjab qualities. In the face of the large supply of cotton of all sorts on the one hand and the political happenings on the other, we did not consider it worth while to put special stress on a changed statistical position of a few thousand bales.

The following is our most recent estimate of the crop and a compilation of the probable distribution. At the same time we are, of course, entirely aware of the fact that in particular for the Far East, but also as far as Europe is concerned, the political development is of much greater importance, than the relatively more or less advantageous price of Indian cotton. If countries, short of foreign exchange, should in one way or another be enabled to buy more freely, the position could of course undergo a considerable change.

	1937/38 29.3.38	1937/38 6.12.37	1936/37 Final
Sind & Punjab Desi	1,070,000	1,105,000	1,090,000
Punjab American & Sind American	1,330,000	1,385,000	1,510,000
United Provinces & Rajputana	350,000	350,000	275,000
Omras	1,698,000	1,850,000	2,158,000
Broach & Surti	525,000	550,000	532,000
Dhollera & Muttia	532,000	527,000	455,000
Comptah/Dharwar	132,000	130,000	148,000
Coconada & Warrangal	36,000	42,000	53,000
Bombay & Madras	203,000	220,000	217,000
Western & Northern Tinnevely & Cambodia	377,000	400,000	385,000
Calcutta & Burma	168,000	173,000	163,000
TOTAL CROP	6,421,000	6,732,000	6,986,000
Domestic Consumption	750,000	750,000	750,000
Carry-over from Old Season	1,118,000	1,118,000	1,105,000
TOTAL SUPPLY	8,289,000	8,600,000	8,841,000
Exports to Europe, etc.	1,000,000	—	1,826,000
Exports to the East	1,000,000	—	2,529,000
Indian Mill Takings	3,000,000	—	2,493,000
Domestic Consumption	750,000	—	750,000
Burma Offtake	100,000	—	125,000
TOTAL OFFTAKE	5,850,000	—	7,723,000
Carry-over to New Season	2,439,000	—	1,118,000

The abundant supply in India has gradually found its expression in a lower price level, as we anticipated. In particular, the short fibre qualities, like Bengal, Sind and Comilla, not used much by the Indian mills, have given way appreciably and are now in a favourable parity with other sorts. Also the staple qualities, much in favour with local mills, record a slight adjustment and we should not be surprised if, in the course of the next few months, they would again be obtainable at really attractive prices.





INTERNATIONAL COTTON STATISTICS



The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half-year ended 31st January, 1938, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

We are pleased to be able to announce that Italian figures for spindles and consumption, as published in the "Gazetta Ufficiale," an Italian Government publication, have come to hand. These figures are retrospective back to January, 1936, and have made our tabulations complete, insofar as consumption is concerned, from a world point of view.

We have again been unable to obtain returns from Spain. Estimates have been prepared for Russia and Spain. Mill Stocks figures for Japan have not been received to date. Our Chinese Association has not been able to collect the usual figures owing to the dislocation of business in Shanghai and an estimate has been made for that country.

Attention is drawn on page 381 to figures relating to the cotton mill consumption and stocks of artificial silk staple fibre (cut rayon).

The total World Cotton Mill Consumption for the Half-year ended 31st January, 1938, compared with that of the same period of the previous year, is as follows :—

	31st January 1938	31st January 1937	Increase or Decrease over same period in 1937
	bales	bales	bales
American Cotton	5,816,000	6,494,000	— 678,000
East Indian Cotton	3,167,000	2,918,000	+ 249,000
Egyptian Cotton	616,000	591,000	+ 25,000
Sundries	3,855,000	4,580,000	— 725,000
All kinds of Cotton	13,454,000	14,583,000	— 1,129,000

The total Cotton Mill Stocks on 31st January, 1938 (exclusive of China, Italy, Japan, and Spain) and 1937 (exclusive of Italy only), in countries reporting, according to continental distribution, were as follows :—

American Cotton :

Europe ..	530,000 bales	against 364,000 bales	on 31st Jan., 1937.
Asia ..	24,000	242,000	" " " "
America ..	1,782,000	2,097,000	" " " "

The total Mill Stocks of American Cotton on 31st Jan., 1938, were 2,347,000 bales, as against 2,708,000 bales in the year 1937.

East Indian Cotton :

Europe ..	214,000 bales	against 190,000 bales	on 31st Jan., 1937.
Asia ..	875,000	1,073,000	" " " "

Altogether the Mill Stocks of East Indian Cotton were 1,105,000 bales against 1,268,000 twelve months ago.

Egyptian Cotton :

Europe ..	156,000 bales against 159,000 bales on 31st Jan., 1937.
Asia ..	24,000 " " 40,000 " " " "
America ..	18,000 " " 19,000 " " " "

The total Mill Stocks of Egyptian Cotton were 220,000 bales against 244,000 bales twelve months ago.

Sundry Cottons :

Europe ..	998,000 bales against 699,000 bales on 31st Jan., 1937.
Asia ..	69,000 " " 693,000 " " " "
America ..	168,000 " " 132,000 " " " "

The **Total Mill Stocks** of all kinds of cotton on Jan. 31st, 1938, in countries reporting, were 5,061,000 bales against 5,900,000 bales on Jan. 31st, 1937.

The **World's Total Spindles** on Jan. 31st, 1938, showed 147,219,000 as against 149,524,000 in July last.

N. S. PEARSE,
General Secretary.

WORKING HOURS

The hours worked by the firms reporting, when calculated out over the whole industry of each country, indicate the following number of hours worked during the half-year under review. The reader will probably notice that 1,248 hours (*i.e.* six months at 48 hours per week) has been exceeded by many countries. This is, of course, due to the fact that some mills are working two and three shifts and also that, in a few cases, more than 48 hours per week are worked.

Half-year ending
Jan. 31st, 1938

		Average hours worked by the industry.
Great Britain *	..	1028·38
Germany ..	..	1305·73
France ..	..	908·07
Italy** ..	..	No reply
Czecho-Slovakia ..	..	1045·56
Belgium ..	..	1533·62
Poland ..	..	1496·08
Switzerland ..	..	1354·69
Holland ..	..	1620·17
Austria ..	..	1272·19
Sweden ..	..	1443·51
Portugal ..	..	1257·72
Finland ..	..	1470·92
Hungary ..	..	2474·12
Yugo-Slavia ..	..	2627·82
Denmark ..	..	1304·06
Norway ..	..	1377·27
Japan ..	..	Not available
China ..	..	Not available
Canada ..	..	2368·79
Mexico ..	..	1408·11
Brazil ..	..	1610·61

U.S.A. In January, 1938, 22,327,000 spindles were active out of a total of 26,611,000 as compared with 24,392,000 active last July.

* Working hours in the American Section averaged 1027·39, and those in the Egyptian Section 1029·46. Twelve firms owning 477,318 spindles in the American Section and two firms owning 192,356 spindles in the Egyptian Section were completely stopped during the six months.

** According to the "Gazetta Ufficiale," the industry was stopped for 2,423,153,438 spindle-hours during the half-year under review.

Estimated COTTON MILL CONSUMPTION
with previous figures for comparison, on basis of Spinners'

COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
	AMERICAN				EAST INDIAN			
	Half-year ending				Half-year ending			
	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936
EUROPE :—								
(1) Great Britain ..	646	641	621	645	231	226	202	190
(2) Germany ..	148	134	119	?	68	88	87	?
(3) France ..	313	307	343	307	112	117	107	106
(4) *Russia ..	—	1	6	52	—	—	—	—
(5) †Italy ..	225	223	185	217	45	47	27	61
(6) Czecho-Slovakia ..	108	127	123	113	33	39	35	23
(7) Belgium ..	79	77	78	78	88	95	84	68
(8) *Spain ..	—	?	48	104	—	?	12	26
(9) Poland ..	89	85	97	111	4	4	1	11
(10) Switzerland ..	16	16	15	15	7	8	6	6
(11) Holland ..	55	55	41	41	25	27	23	22
(12) Austria ..	41	44	44	51	14	18	14	21
(13) Sweden ..	53	58	65	56	1	1	1	1
(14) Portugal ..	13	11	15	23	2	2	2	1
(15) Finland ..	27	27	25	25	—	—	—	—
(16) Hungary ..	26	24	30	23	5	9	6	6
(17) Yugo-Slavia ..	22	18	16	15	13	14	14	14
(18) Denmark ..	16	17	20	17	—	—	—	—
(19) Norway ..	5	6	6	6	—	—	—	—
Total ..	1,882	1,871	1,897	1,899||	648	695	621	556||
ASIA :								
(1) India ..	13	9	9	49	1,418	1,315	1,230	1,266
(2) Japan ..	650	747	618	842	1,024	1,004	978	821
(3) *China ..	40	37	38	70	30	42	43	39
Asia Total ..	703	793	665	961	2,472	2,361	2,251	2,126
AMERICA :								
(1) U.S.A. ..	3,005	3,998	3,767	2,947	32	38	39	25
(2) Canada ..	161	151	144	117	—	—	—	—
(3) Mexico ..	22	—	—	—	—	—	—	—
(4) Brazil ..	—	—	—	—	—	—	—	—
America Total ..	3,188	4,149	3,911	3,064	32	38	39	25
Other Countries ..	43	22	21	40	15	10	7	9
HALF-YEAR'S TOTAL ..	5,816	6,835	6,494	5,964||	3,167	3,104	2,918	2,716||

* No returns received. Estimates given.

† Figures extracted from the "Gazetta Ufficiale."

for the half-year ending 31st January, 1938,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936
183	206	184	181	369	382	389	322	1,429	1,455	1,396	1,348 (1)
60	65	44	?	273	254	351	?	549	541	601	? (2)
64	81	70	72	92	97	82	96	581	602	602	581 (3)
—	—	—	—	1,206	1,059	1,129	1,038	1,206	1,060	1,135	1,090 (4)
38	44	26	43	19	14	8	11	327	328	246	332 (5)
24	20	25	21	40	45	31	23	205	237	214	180 (6)
4	5	5	5	58	53	55	69	229	230	222	220 (7)
1	?	16	34	84	34	11	23	85	34	87	187 (8)
13	16	17	14	48	27	19	11	154	132	134	147 (9)
23	24	21	19	14	12	10	6	60	60	52	46 (10)
2	3	2	1	64	64	67	51	146	149	133	115 (11)
11	11	10	9	26	28	25	20	92	101	93	101 (12)
4	4	3	3	5	5	3	1	63	68	72	61 (13)
3	3	2	3	27	27	22	10	45	43	41	37 (14)
1	1	1	1	3	3	2	3	31	31	28	29 (15)
6	7	6	8	14	19	7	9	51	59	49	46 (16)
3	3	4	3	6	3	6	7	44	38	40	39 (17)
—	—	—	—	1	1	1	1	17	18	21	18 (18)
—	—	—	—	1	—	—	1	6	6	6	7 (19)
440	499	436	417	2,350	2,127	2,218	1,712	5,320	5,192	5,172	4,584
33	27	29	36	171	189	146	130	1,635	1,540	1,414	1,481 (1)
52	67	44	43	371	243	301	88	2,097	2,061	1,941	1,794 (2)
4	15	15	12	241	1,169	1,197	1,064	315	1,263	1,293	1,185 (3)
89	109	88	91	783	1,601	1,644	1,282	4,047	4,864	4,648	4,460
22	28	24	23	22	27	14	6	3,081	4,091	3,844	3,001 (1)
2	5	4	6	—	—	—	—	163	156	148	123 (2)
—	1	—	—	74	103	102	111	96	104	102	111 (3)
—	—	—	—	313	350	353	317	313	350	353	317 (4)
24	34	28	29	409	480	469	434	3,653	4,701	4,447	3,552
63	40	39	14	313	307	249	185	434	379	316	248
616	682	591	551	3,855	4,515	4,580	3,613	13,454	15,136	14,583	12,814

Exclusive of Germany.

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936
EUROPE :									
(1)	Great Britain ..	86	70	61	61	59	100	43	29
(2)	Germany ..	54	20	15	?	14	13	19	?
(3)	France ..	130	109	103	93	61	97	57	67
(4)	*Russia ..	—	—	—	—	—	—	—	—
(5)	†Italy ..	?	?	?	?	?	?	?	?
(6)	Czecho-Slovakia ..	49	32	36	43	12	20	9	7
(7)	Belgium ..	40	28	29	31	34	61	31	30
(8)	†Spain ..	—	?	Nil	17	—	?	Nil	4
(9)	Poland ..	8	7	5	6	1	1	1	2
(10)	Switzerland ..	22	13	20	18	8	13	6	3
(11)	Holland ..	41	25	26	24	14	21	8	6
(12)	Austria ..	13	8	11	12	2	4	4	4
(13)	Sweden ..	33	20	21	25	—	1	—	—
(14)	Portugal ..	6	2	2	5	—	2	—	—
(15)	Finland ..	12	6	10	5	—	—	—	—
(16)	Hungary ..	14	7	9	7	3	8	2	1
(17)	Yugo-Slavia ..	11	4	7	7	6	10	10	10
(18)	Denmark ..	8	5	5	7	—	—	—	—
(19)	Norway ..	3	3	4	2	—	—	—	—
Europe Total ..		**530	359\$	364\$	363||	**214	351\$	190\$	163||
ASIA :									
(1)	India ..	24	7	4	16	875	972	865	627
(2)	†Japan ..	—	304	288	214	—	457	206	124
(3)	†China ..	—	18	10	18	—	23	2	5
Asia Total ..		**24	329	242	248	**875	1,452	1,073	756
AMERICA :									
(1)	U.S.A. ..	1,716	1,223	2,034	1,404	12	18	4	7
(2)	Canada ..	66	81	63	56	—	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total ..		1,782	1,304	2,097	1,460	12	18	4	7
Other Countries ..		11	7	5	18	4	4	1	1
HALF-YEAR'S TOTAL ..		**2,347	1,999\$	2,708\$	2,089||	**1,105	1,825\$	1,268\$	927||

* No returns received. Estimates given,

**With exceptions as indicated.

† No returns received.

31st January, 1938, with previous figures for made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)												
EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	Jan. 31 1938	July 31 1937	Jan. 31 1937	Jan. 31 1936	
46	55	58	65	79	96	72	60	270	321	234	215	(1)
17	10	11	?	142	24	45	?	227	67	90	?	(2)
41	39	43	49	64	68	51	59	296	313	254	268	(3)
—	—	—	—	610	360	415	356	610	360	415	356	(4)
?	?	?	?	?	?	?	?	?	?	?	?	(5)
12	14	11	12	11	15	8	8	84	81	64	70	(6)
2	3	2	2	22	24	29	20	98	116	91	83	(7)
—	?	Nil	11	—	?	Nil	5	—	?	Nil	37	(8)
3	3	2	1	6	7	3	1	18	18	11	10	(9)
22	15	20	19	9	10	9	7	61	51	55	47	(10)
1	1	1	1	31	34	41	22	87	81	76	53	(11)
4	4	4	4	4	7	8	5	23	23	27	25	(12)
2	2	2	3	2	2	1	1	37	25	24	29	(13)
1	1	1	2	8	7	8	5	15	12	11	12	(14)
1	1	—	1	1	1	1	1	14	8	11	7	(15)
3	2	2	3	5	8	3	3	25	25	16	14	(16)
1	1	2	1	4	4	5	4	22	19	24	22	(17)
—	—	—	—	—	—	—	—	8	5	5	8	(18)
—	—	—	—	—	—	—	—	3	3	4	2	(19)
**156	151§	159§	174||	**998	667§	699§	558||	**1,898	1,528§	1,412§	1,258||	
24	16	15	17	69	94	35	57	992	1,089	919	717	(1)
—	34	20	21	—	112	74	42	—	907	528	401	(2)
—	5	5	3	—	336	584	333	—	382	601	359	(3)
**24	55	40	41	**69	542	693	432	**992	2,3 8	2,048	1,477	
17	21	16	13	12	21	5	6	1,757	1,283	2,059	1,430	(1)
1	2	3	4	—	—	—	—	67	83	66	60	(2)
—	—	—	—	36	43	25	25	36	43	25	25	(3)
—	—	—	—	120	130	102	83	120	130	102	83	(4)
18	23	19	17	168	194	132	114	1,980	1,539	2,252	1,598	
22	35	26	5	154	158	156	106	191	204	188	130	
**220	264§	244§	237||	**1389	1,561§	1,680§	1,210||	**5,061	5,649§	5,900§	4,463||	

|| Exclusive of Germany and Italy.

§ Exclusive of Italy.

ESTIMATED TOTAL WORLD'S COTTON
years ended 31st Jan., 1938, and 31st July,
the International

COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULF SPINDLES	
	Half-year ended		Half-year ended	
	Jan. 31, 1938	July 31, 1937	Jan. 31, 1938	July 31, 1937
EUROPE :				
(1) Great Britain	37,340†	38,753	26,752	28,002
(2) Germany	10,323	10,236	2,791	2,893
(3) France	9,783	9,783	2,303	2,303
(4) *Russia	10,050	10,050	1,000	1,000
(5) ††Italy	5,395	5,389	482	476
(6) Czecho-Slovakia ..	3,357	3,445	1,239	1,324
(7) Belgium	1,993	2,004	269	274
(8) *Spain	2,070	2,070	431	431
(9) Poland	1,715	1,693	444	453
(10) Switzerland	1,248	1,269	346	379
(11) Holland	1,206	1,191	241	230
(12) Austria	742	776	212	237
(13) Sweden	546	584	37	39
(14) Portugal	469	469	130	130
(15) Finland	311	313	38	41
(16) Hungary	317	317	30	30
(17) Yugo-Slavia	177	154	29	29
(18) Denmark	99	99	—	—
(19) Norway	44	44	3	3
Total Europe ..	87,185	88,639	36,777	38,274
ASIA :				
(1) India	9,763	9,876	544	587
(2) Japan	12,297	11,880	8	8
(3) *China	4,000	5,071	—	—
Total Asia ..	26,060	26,827	552	595
AMERICA :				
(1) U.S.A.**	26,611	26,983	438	438
(2) Canada	1,136	1,108	64	54
(3) Mexico	843	869	5	7
(4) Brazil	2,719	2,714	18	27
Total America ..	31,309	31,674	525	526
Other Countries ..	2,665	2,384	277	279
Grand Total ..	147,219	149,524	38,131	39,674

*No returns received. Estimated figures given for China, previous figures for Italy, Russia and Spain.

**U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

†Of this total, twist spindles 20,494,000; weft spindles 16,846,000.

††Figures for total spindleage extracted from the "Gazetta Ufficiale." The division

SPINNING SPINDLES (000's omitted) for the half-1937, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION	
Half-year ended		Half-year ended		Half-year ended	
Jan. 31, 1938	July 31, 1937	Jan. 31, 1938	July 31, 1937	Jan. 31, 1938	July 31, 1937
10,588	10,751	15,598	16,789	43	68 (1)
7,532	7,343	904	940	—	— (2)
7,480	7,480	2,305	2,467	12	1 (3)
9,059	9,050	—	—	?	? (4)
4,913	4,913	700	700	?	? (5)
2,118	2,121	667	687	10	6 (6)
1,724	1,730	74	78	5	3 (7)
1,639	1,639	207	207	?	? (8)
1,271	1,240	230	331	18	14 (9)
902	890	760	702	7	7 (10)
965	961	33	32	2	9 (11)
530	539	77	116	—	— (12)
509	545	61	61	—	2 (13)
339	339	48	51	—	— (14)
273	272	28	30	—	— (15)
287	287	56	58	3	— (16)
148	125	22	22	14	12 (17)
99	99	—	1	—	— (18)
41	41	—	—	—	— (19)
50,408	50,365	21,770	23,272	114	122
9,219	9,289	402	529	70	57 (1)
12,289	11,872	1,000	1,026	?	120 (2)
4,000	5,071	—	—	?	? (3)
25,508	26,232	1,402	1,555	70	177
26,173	26,545	1,000	1,000	?	? (1)
1,072	1,054	29	69	—	10 (2)
838	862	—	4	1	— (3)
2,701	2,687	—	—	20	9 (4)
30,784	31,148	1,029	1,073	21	19
2,388	2,105	428	361	57	38
109,088	109,850	24,629	26,261	262	356

TOTAL WORLD

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1937**	150,878,000	2,708	1,268	244	1,680	5,900	39.08
" 1936†	153,120,000	2,089	927	237	1,210	4,463	29.14
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30.77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33.39
" 1933	158,984,000	2,899	832	208	803	4,542	28.57
" 1932	162,070,000	2,775	984	212	637	4,608	28.43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28.04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29.86
" 1929	165,104,000	2,958	1,216	182	938	5,294	32.06
" 1928	164,979,000	2,867	960	183	863	4,882	29.59
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38.09
Aug. 1, 1937**	149,524,000	1,999	1,825	264	1,561	5,649	37.76
" 1936†	151,705,000	1,475	1,557	221	1,216	4,469	29.45
" 1935*	153,778,000	1,651	1,516	258	1,133	4,558	29.64
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34.02
" 1933	157,755,000	2,558	1,527	235	730	5,050	32.01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27.71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26.58
" 1930	164,108,000	1,985	1,667	237	609	4,498	27.41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29.61
" 1928	165,103,000	2,112	1,728	170	777	4,787	28.99
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28.42

ESTIMATED COTTON MILL CONSUMPTION—In thousands of ACTUAL BALES (000's omitted)

Half-year ending								
July 31, 1937	149,524,000	6835	3104	682	4515	15136	101.23	88
Jan. 31, 1937	150,878,000	6494	2918	591	4580	14583	96.65	88
July 31, 1936†	151,705,000	6281	2762	516	3592	13151	86.69	57
Jan. 31, 1936†	153,120,000	5964	2716	551	3613	12844	83.88	57
July 31, 1935*	153,778,000	5409	2710	563	3519	12201	79.34	12
Jan. 31, 1935*	155,157,000	5444	2889	521	3363	12217	78.78	12
July 31, 1934	156,878,000	6513	2403	564	3098	12578	80.18	65
Jan. 31, 1934	157,718,000	7022	2369	544	2599	12534	79.47	65
July 31, 1933	157,755,000	7323	2161	472	2514	12470	79.04	78
Jan. 31, 1933	158,984,000	6847	2059	462	2514	11882	74.74	78
July 31, 1932	161,002,000	6202	1976	493	2121	10792	67.03	17
Jan. 31, 1932	162,070,000	6117	2812	487	2114	11530	71.14	17
July 31, 1931	162,278,000	5630	2850	459	2385	11324	69.75	00
Jan. 31, 1931	163,571,000	5278	3013	394	2479	11164	68.25	00
July 31, 1930	164,108,000	5940	3102	435	2530	12007	73.16	10
Jan. 31, 1930	165,143,000	7083	2985	502	2632	13202	79.94	10
Year ending Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160.34	

* Consumption and stock figures exclusive of Germany.

† Consumption figures exclusive of Germany and stock figures exclusive of Germany and Italy.

The following figures show the consumption of cut Rayon or Artificial Silk Staple Fibre *by the cotton spinning industry* in certain specified countries, during the half-year ending January 31, 1938, and stocks in spinners' hands at the end of that period.

Country	Quantity of Staple Fibre spun (in lbs.)	Quantity of Staple Fibre in stock (in lbs.)
Great Britain	9,786,794	1,630,089
France	1,847,941	641,369
Czecho-Slovakia	910,839	1,326,069
Poland	648,272	752,994
Holland	537,534	261,624
Sweden	1,015,269	110,610
Hungary	2,664,720	661,180 (Approximate)
India	106,703	236,416
Other Countries	1,541,307	855,836

No replies were received from Italy, Russia, Spain, Japan, China or U.S.A. Germany stated that, during the period under review about 54,000 tons of "Zellwolle" had been consumed by the cotton and woollen spinning industries jointly. Countries listed under "Other Countries" include Belgium, Switzerland, Austria, Portugal, Finland, Norway, Denmark, Canada, Mexico and Brazil. This has been done in order to avoid disclosure of the activities of individual firms.

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SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending January 31st, 1938, estimated from Actual Returns

CONSUMPTION

Country	Peru- vian	Brazil- ian	Argen- tine	West Indian	Mexi- can	Turk- ish	Rus- sian	Iraq	Sudan	East African	West South African	Chinese	Others	Total
Great Britain ..	53,639	140,929	19,448	5,365	628	3,318	19,419	200	79,430	16,115	19,644	—	4,051	368,975
Germany ..	—	—	—	—	—	—	—	—	—	—	—	—	273,000	†273,000
France ..	19,408	24,289	1,165	1,238	—	348	—	—	8,991	—	11,806	—	24,580	†19,965
Italy ..	—	—	—	—	—	—	—	—	—	—	—	—	1,878	†1,878
Belgium ..	4,116	13,909	183	—	—	—	—	—	401	—	35,657	—	3,975	57,176
Switzerland ..	1,222	1,702	307	—	—	14	—	—	3,102	1,782	4,910	617	—	13,656
Poland ..	4,082	20,598	184	—	—	2,588	1,078	—	3,052	1,150	11,860	608	2,432	48,212
Holland ..	2,106	6,065	—	—	—	—	—	—	83	197	36,849	—	—	64,066
Czechoslovakia ..	855	12,420	23	462	63	870	14	5	1,699	152	17,174	—	5,957	39,694
Austria ..	240	4,152	—	—	—	—	—	—	74	479	20,074	—	—	25,745
Sweden ..	—	4,080	—	—	—	—	—	—	—	—	—	—	709	4,789
China ..	—	—	—	—	—	—	—	—	—	—	—	241,000	—	†241,000
Brazil ..	—	313,000	—	—	—	—	—	—	—	—	—	—	—	313,000
Mexico ..	—	—	—	—	74,000	—	—	—	—	—	—	—	—	74,000
Japan ..	—	218,030	—	—	—	—	—	—	—	49,345	—	—	—	218,030
Hungary ..	13	4,030	—	—	—	118	—	—	1,643	—	8,198	—	—	14,370
India ..	982	783	274	5,219	—	38	298	—	47,880	109,821	2,227	—	607	170,783
Total ..	86,683	769,620	21,584	12,292	74,691	7,394	20,800	659	146,655	170,241	168,509	286,177	431,163	2,190,355

STOCKS

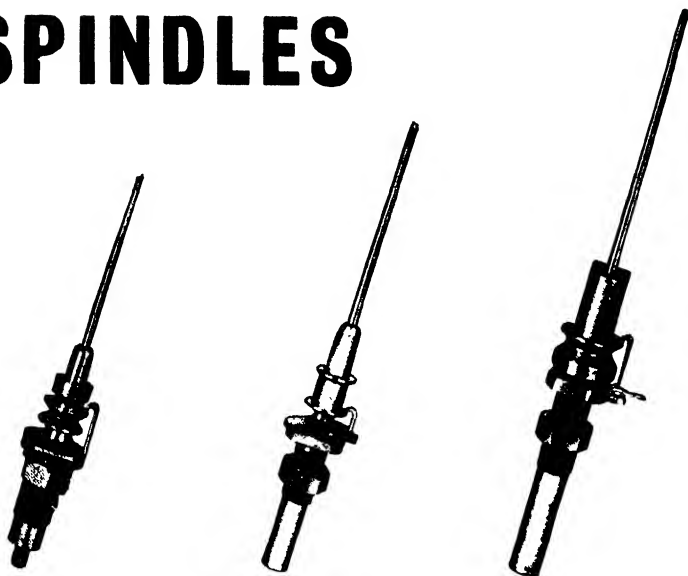
Country	Peru- vian	Brazil- ian	Argen- tine	West Indian	Mexi- can	Turk- ish	Rus- sian	Iraq	Sudan	East African	West South African	Chinese	Others	Total
Great Britain ..	13,366	12,748	1,028	2,877	303	587	2,785	21	40,147	2,096	1,901	—	16	75,883
Germany ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—
France ..	3,238	16,988	428	1,219	—	321	—	—	14,858	—	13,936	—	142,000	†142,000
Italy ..	—	—	—	—	—	—	—	—	—	—	—	—	13,904	64,892
Belgium ..	1,814	4,499	—	—	—	—	—	—	209	—	13,021	—	—	21,877
Switzerland ..	1,965	9,674	58	—	—	5	—	—	1,945	1,463	3,391	—	—	9,407
Poland ..	2,048	2,012	—	—	—	—	—	—	582	—	17,869	—	2	20,461
Holland ..	2,446	5,042	—	—	—	—	—	—	—	—	14,307	—	—	31,180
Czechoslovakia ..	155	2,475	—	—	51	848	370	—	1,208	144	3,295	—	12,176	11,071
Austria ..	83	1,093	—	—	—	—	—	39	—	26	2,341	—	2,435	3,582
Sweden ..	—	—	—	—	—	—	—	—	—	—	—	—	313	1,508
China ..	—	120,000	—	—	—	—	—	—	—	—	—	—	—	120,000
Brazil ..	—	—	—	—	36,000	—	—	—	—	—	—	—	—	36,000
Mexico ..	307	1,355	—	—	—	—	—	—	—	—	—	—	—	1,662
Hungary ..	806	1,108	98	2,501	—	—	—	—	—	—	—	—	—	5,882
India ..	—	—	—	—	—	—	—	—	—	—	—	—	720	68,886
Total ..	24,319	165,595	2,212	6,597	36,354	1,903	4,453	62	53,935	42,680	50,989	—	173,903	600,931

* No returns received. Figures taken from the *Gazette Officielle*.

† No returns received. Figures estimated.

Bale-Weights (Gross) in lbs.: Peru 480, Brazil 396, Argentine 500, West Indian 500, Mexico 500, Russian 396, Iraq 413, Sudan 450, E. Africa 410, W. Africa 414, S. Africa 500, Australia 511, Chinese 620, Paraguay 462, Turkey 460.

SPINDLES



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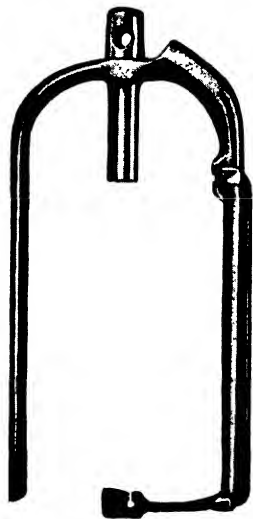
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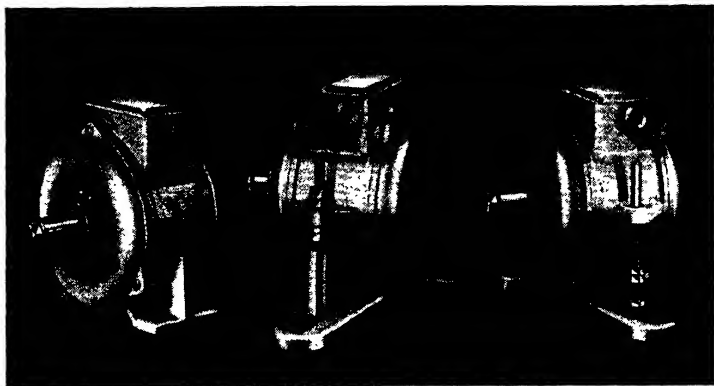
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EFFECTS OF MECHANICAL CHANGES IN THE COTTON TEXTILE INDUSTRY, 1910-1936

The following article by J. F. Culpepper is reprinted from the well-known U.S. textile journal, *Cotton*.

An interesting comparison between the number of employees necessary to operate a mill in 1910 and the number required for the same results in 1936 is given in a recent government publication entitled "Effects of Mechanical Changes in the Cotton-Textile Industry, 1910-1936," published by the Bureau of Labour Statistics, Department of Labour, Washington, D.C. Prepared in collaboration with Barnes Textile Associates, Inc., Boston, Mass. Comprehensive reports and analyses were used to determine the possible production per man-hour in 1910 and 1936, assuming the modern machinery available in each year was used. Four types of fabric were selected—carded broadcloth, sheeting, print cloths, and terry cloth. The report reveals the increase in productive capacity of operatives over the period between these two years, and reveals as well the effect of improved equipment on man-hour production. The following is our summary of the more important findings :

Expressing all figures in percentage, we find on carded broadcloth that the man-hour increase possible in production over 1910 and for 1936 was 49.69 per cent. That is, if the mill could produce 16.30 yards of carded broadcloth per operative in 1910, it could produce 24.40 yards per operative in 1936, just 26 years later. Other figures indicate that for sheeting the increase in percentage of production over the same comparative periods was 55.44 per cent. ; for print cloths 51.50 per cent., and for terry cloths 151.50 per cent. This exceptionally large possible increase in terry cloth output per man-hour is due to the development and adoption during this period of the automatic loom for weaving terry cloth, while broadcloth, sheeting, and print cloths already were being woven on automatic looms in 1910.

The reader will note that the term "possible production" is used. The study was made from an engineering and not a statistical standpoint, and though composite mill records were made on the performance of various departments having modern machinery, at the time of the study there was no mill completely equipped in every department with the

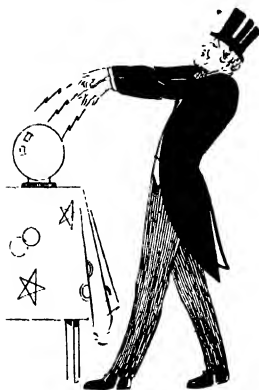
most up-to-date machinery. The report is based on engineering facts of what *could be* done were the plant equipped throughout with the modern equipment available. It was also assumed that the type of labour available remained constant and that the working hours remain unchanged. In other words, the study shows the best that could have been done in 1910 as compared with the best that could have been done in 1936.

Naturally, the greatest increase in man-hour productivity occurred in the department which underwent the largest amount of mechanical improvement. This proved to be spooling and warping and needs no further explanation. The possible increase in man-hour production in this department on carded broadcloth was 150.0 per cent., sheeting 169.2 per cent., prints 159.6, and terry cloth 171.7 per cent. Although the percentage increase in the labour productivity of the spooling and warping department was greater than for any other department, this department employs a smaller number of operatives than most of the other departments and consequently has a smaller effect on total labour requirements.

In the opening and carding departments there have been a number of radical changes in the methods of processing and in the machinery used. Besides the radical change from three-process picking to one-process picking, numerous improvements have been made in the pickers and in the opening and blending machines, thus affecting directly the possible man-hour production in the following departments of the mill. Cards have changed little since 1910, with the exception of better stripping means, but the mills now have improved drawing frames, with the elimination of a process or so, and long draft roving frames. Following the same four fabrics in the preparatory department of opening and carding, the increase in man-hour output for carded broadcloth is 85.12 per cent. sheeting, 112.49, prints 93.05, and terry cloth 112.30.

Though the improvements in spinning have been many, as compared with the possible production in other departments the increase has been less. Long draft, adoption of large packages in roving frames, large package spinning, wider gauge frames, improved spindles, improved and controlled humidification, and in some cases the elimination of separators, along with many other fine improvements, have helped in the production of spinning. The increase per man-hour for 1936 over 1910 on carded broadcloth was 32.21 per cent. sheeting, 38.89, prints 37.35, and for terry cloth 45.56 per cent.

Having already mentioned spooling and warping, we pass to slashing where we find that not only does the man-hour output increase, but the quality also. The slasher in 1936 was capable of producing 327 lb. of warp per hour for carded broadcloth, whereas in 1910 it could process only 131 lbs. per hour. The man-hour increase for the slashing department for 1936 over the period 26 years earlier on carded broadcloth proved to be 50.00 per cent., sheeting 60.00 per cent., prints 66.67 per cent., and for terry cloth 65.56 per cent. With the radical changes in some slashing systems these figures should be considerably increased at the next survey. Doubtless the automatic controls have done much to improve the quality of the product from slashers, mentioned previously.



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Looms have been improved in design and better materials are now used in the manufacture of the component parts, resulting in fewer stops for repairs. With the newer designs the speeds have also been greatly increased; in 1910 a 40-inch plain automatic loom operated at 160 picks per minute and in 1936 at 192 picks per minute. Other improvements include the let-off, take-up, and warp stop motions, larger loom beams, larger cloth rolls, and redesigned shuttles. Besides these factors, the weaving efficiency has improved from 2 to 5 per cent. to add to the man-hour output of 1936 over 1910. Possible man-hour production increases for carded broadcloth were 48.43 per cent., sheeting 37.78, prints 41.24, and terry cloths 290.62. (This last figure is no error on the printer's part, but, as explained, includes the adoption of the automatic loom on this fabric, whereas the other fabrics were already being made on automatics.)

Cloth room machinery, such as automatically controlled shear and brushing machines, inspecting machines, etc., has been improved also. Though increases are somewhat lower by comparison with other departmental increases in man-hour output, carded broadcloth increased 11.77 per cent., sheeting 15.38, prints 15.34, and terry cloths 2.99.

With all of the increases in man-hour output in the productive departments, there developed a need for more miscellaneous labour, such as power, yard and maintenance. There were more workers used for miscellaneous labour in all types of mills except those making terry cloth, which showed a slight decrease in number of workers.

THE BALDUS/PROSS SYSTEM FOR SINGLE-UNIT PROCESSING

(Patent No. 16249/37 applied for in England and Patents pending throughout the textile world.)

At the request of several Lancashire cotton spinners, Mr. Henry Meynell, the well-known Lancashire textile technician, recently visited Germany in order to investigate the possibilities and efficiency of the above system of processing at the cardroom. Mr. Meynell's investigations, which are set out below, were conducted at the mill of Messrs. Franz, Beckmann & Co., of Bocholt. The following account is taken from the *Textile Weekly*, of Manchester :—

The Baldus/Pross method of processing begins at the drawing frame and its chief feature is a specially constructed condensor-trumpet, which compresses a finely delivered sliver and is quickly and easily applied to the finisher heads of the draw frame. This condensor-trumpet differs in many ways to some which have been recently experimented with and after over twelve months of experimental work in the mill of Messrs. Beckmann, it has been perfected and is now offered to the cotton mills



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of the world with the necessary experience behind it which will give immediate success to all those who have the confidence and the progressive spirit behind their enterprise.

The old trumpet, with its comparative large orifice is superseded, and the new one, having a hole no larger than the size of a pin-head is substituted, and reaches to the nip of the calender rollers, thus ensuring that, even the shortest stapled cotton is properly controlled ensuring a wonderful parallel laying of the sliver. The coiler-top with its large channel is reduced in size, and this enables the fine sliver to pass on to the can in such a level state (no roughness) that a better yarn is produced.

Doubling takes place at the carding head in the usual manner. From this head the delivered sliver is again doubled six into one at the finisher heads, with an increased draft, delivering a sliver of from $\cdot 40$ to $\cdot 75$, which is then put up in cans at the feed of the intermediate frames, which is "framed" into a 1.8 roving, taken then direct to the ring frame or mule and spun into 24's to 30's American twist. Of course, with the usual adjustments, a finer roving is made to spin as far as 42's, and at Messrs. Beckmann's Mill all counts 4's to 42's are spun on the Baldus/Pross method of processing and various cottons and mixtures of so-called "Zellwolle"—from the fir tree—used.

There are, of course, several spinning data and these are in accordance with requirements and commensurate with the cotton used, and, as is well known, Germany has to make the best of what raw materials she can obtain. In the factory in Germany Mr. Meynell saw many kinds of cotton being worked—American, Brazilian, Turkish, and Mexican—and these were mixed to a stipulated percentage with "Zellwolle." He also saw the processing and spinning of bast fibres, a fibrous material of very short staple from hemp and jute. The yarn, spun out in the usual manner described here, is manufactured into overalls, table-cloths, curtains, etc. Some of the general spin-plans are :—

Card Sliver	Draw	Inter.	Ring frame
$\cdot 13$	$\cdot 30$	1.2	Up to 16's T.
$\cdot 13$	$\cdot 35$	1.5	16's to 30's T.
$\cdot 13$	$\cdot 40$	1.8	30's to 42's T.

In the Baldus/Pross system of processing, up to and including the flat card, no alteration whatever takes place, but, as in all well-managed mills, great care and attention is paid to details in processing at the blowing and carding. The only alteration is at the two heads of drawing of a three-box machine and beyond this stage the only speed frames used are intermediates (or slubbers used as Inters.), and all speed frames are without creels. Slubbing frames, as such, and roving frames are entirely dispensed with.

Inasmuch as the fine sliver delivered from the finisher head is exceptionally parallel and free from any roughness—coupled with the fact that it is exceedingly strong—it spins out into the required roving hanks with a decimal percentage of breakages, and to any practical spinner it must be obvious that, coming direct from the can to the spindle much "bad-work" is obviated by the discarding of creel bobbins. Approxi-

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mately a thirty-hour feed per intermediate spindle is out of each sliver-can.

The Beckmann factory has a total of 41,000 ring spindles, three-quarters of which are fitted with high draft, mainly of the leather-tape type, long-lift, roller bearing spindles, tape drive. It is not absolutely necessary to have all these modern devices to obtain the economical results brought about by the new Baldus/Pross system, but it is obvious that in conjunction with high draft the resultant economy is greater.

Mr. Meynell also deals with the number of preparation machines which were in use prior to the adoption of the Baldus/Pross Single-Unit Processing at the German firm which he visited :—

OLD METHOD
41,000 Ring spindles
Average 20's.
Coarsest 4's, finest 42's.
8 sets Drawing.
8 slubbers.
10 Inters.
28 Rovers.
—
54 Total machines.

NEW METHOD
41,000 Ring spindles
Average 20's.
Coarsest 4's, finest 42's.
7 sets Drawing.
4 Slubbers used as
Inters. on 1/1.3s.
10 Inters.
—
21 Total machines.

Notwithstanding the equivalent of over 50 per cent. reduction in the number of preparatory machines, no loss in production has taken place, as will be seen by making a careful comparison of the number of drawing and slubbing frames.

It requires little imagination for the interested, progressive, and practical spinner to realise that, by the use of this Baldus/Pross system of processing, the cost of yarn production is reduced considerably, and Mr. Meynell estimates that the cost on various medium yarns is reduced by $\frac{1}{4}$ d. to $\frac{1}{2}$ d. per lb.

Mr. Meynell was officially informed that at the German mill which he visited a saving of some £2,500 per annum has been effected by the adoption of the Baldus/Pross method, and Mr. Meynell is certain that the practical Lancashire spinner will be able to calculate for himself, taking as his basis 20's with a total of, say, 40,000 spindles, 50,000 weight at $\frac{1}{4}$ d. is £50 per week, or £2,500 per annum.

The cost to install (in Germany) is about £400 to £450 per each 10,000 spindles, and if cash realised by the sale of redundant speed frames is deducted, the net cost would work out at, say, £350 to £400 per 10,000 spindles in a medium-count mill.

The figures given above are approximate and would vary according to the counts spun in the different mills, as in a finer mill there would be a greater number of finisher deliveries per 10,000 spindles, and again there must be taken into account the import duties, etc. Definitive costs can be obtained from the sole agents of the Baldus/Pross system for England and the Colonies (including India), Messrs. Henry Meynell's Son & Co., 759 Bury Road, Rochdale, on application.

CASABLANCAS AUTOMATIC LEVER WEIGHTING

The Casablanclas Automatic Lever Weighting system introduced not so very long ago by the firm of Casablanclas is described in a recent issue of the firm's house organ, *The Spinner*. The Automatic Lever Weighting, which is equally applicable to old and new machines, has been installed on over four million spindles already, and during the year 1937 alone several hundreds of new ring frames equipped with this firm's automatic levers were supplied by English and continental machinery makers.

The new Automatic system of weighting not only avoids the drawbacks of previous known methods but also has many new advantages which will be described here briefly. The automatic levers are held by a hexagon bar close beneath the middle and back rollers. The levers themselves are made of electro-plated steel, and are, therefore, rustless. They are so designed that it is impossible for any lever to become jammed or in any way ineffective or inoperative.

To release the weight of the three rollers, the front saddle is merely lifted, and the device automatically clicks into the "unweighted" position. All that is required to put the pressure on again is to push the front saddle downwards. Thus, the whole operation of weighting and unweighting becomes as quick and simple as the switching on and off of an electric light. Many mills are taking advantage of this great facility

for unweighting their machines before the week-ends or other periods of long stoppage, so as to preserve the leather-covered rollers. The operative can release the pressure on all top rollers of a ring frame practically as fast as she can walk round it.

In addition to the rapidity and simplicity of the weighting and unweighting operation, there is the great advantage that this is done with one hand only—one finger in fact—so that when removing front top roller laps, etc., the operative has one hand available all the time and can therefore perform her work much quicker.

With the new Automatic Weighting there are no hooks hanging in front of the rollers as in the ordinary dead weighting system, nor is it ever necessary for any reason to reach underneath the rollers either from the front or from the back as must be done with the ordinary machines equipped with levers and weights.

The suppression of the weight hooks in front of the rollers facilitates the operation of picking up. The machine is also cleaner at the front without the hooks, and the usual fault of the yarn picking up bits of fluff from these is, naturally, eliminated altogether. The roller beam, which is now absolutely clear, can be comfortably and quickly wiped down.

As both the front of the frame and the roller beam are entirely free from any encumbrances, the doffing is also facilitated, very particularly in those mills where the practice is to place the empty bobbins or tubes on the roller beam in readiness for the doffing.

The machines with Automatic Weighting are much lighter, and this, besides being an advantage when the machines are new and have to be transported to the mill, may also be an advantage on account of the reduced weight to be supported by the floors of the mills. In many 4 or 5 storey factories with the Ring frames on the top storeys this difference in weight may well be of considerable importance.

The use of the Automatic Lever Weighting offers many other advantages of real practical value, such as, for instance, the incomparably greater facility for removing and replacing the top rollers and the underclearers; there are hardly any of the routine duties of the operative spinner that are not made simpler and easier by the installation of the new method.

FANCY YARN DOUBLER

A new doubling frame which has just been put on the market by the well-known Stockport engineering firm of Arundel, Coulthard & Co. Ltd. is capable of dealing with yarn of any construction or fibre in the production of fancies of every conceivable kind. Not only will it produce the normal types of fancies—corkscrew, spiral, spot, slub, etc.—but these can often be combined in one yarn, giving a range which few mills have hitherto been in a position to supply.

The chief point of the machine is, of course, the gearing to the rollers. This is through a patented epicyclic differential gear. In this way each

line of rollers may be driven at a constant speed, or a positive intermittent motion can be given to any one line as required.

The differential gear consists of an internal cut gear working in conjunction with an ordinary gear. Running on the inside of the internal cut gear are two pinions controlled by the outside gear. These two pinions are in mesh with a third pinion on the roller driving shaft. Control of the differential is by means of a pattern chain, consisting of ordinary links and lift links which can be inserted as required, according to the type of yarn to be produced.

The chain controls the lifting and falling of a ratchet which engages the teeth of the outside gear. When the ratchet is lifted clear of the teeth the outside gear revolves with the interior cut gear and the roller shaft is stationary. When the ratchet falls it stops the outside gear for a predetermined length of time, this bringing into action the pinions inside the interior gear and therefore driving the roller shaft.

The use of a simple pattern chain for the various types of yarn means that there is practically no limit to the length of repeat, and it is, in fact, possible to obtain without difficulty a perfect random slub or other similar random effect.

The machine is made with three lines of bottom rollers on each side of the frame. These rollers may be plain or fluted, according to the requirements of the mill to which they are supplied. The top rollers are slightly larger than the bottom ones, and the machine is usually supplied with two lines plain and one line grooved, for producing loop and snarl yarn.

Special provision is made for the production of a wide range of knop yarns, the popularity of which is a feature of textile production at the present time. The knopping bars are made in sections and are carried from the roller stands. They are adjustable both horizontally and vertically, as are also the guide rods over which the yarn travels from the rollers to the knopping bars. Spindles are tape or band driven as required, and the building motion is arranged for either taper or cop build. Main drive, if from a lineshaft, is through cone pulley to allow for varying speeds according to the quality of yarn in process.

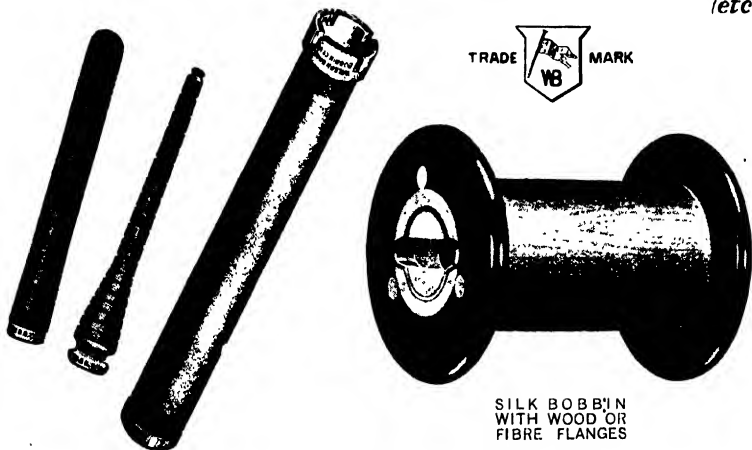
(Manchester Guardian Commercial)

SPINNING TESTS ON PUNJAB-AMERICAN 4F COTTON WITH DIFFERENT SCHEMES OF DRAFTS IN THE SPEED FRAMES

The Indian Central Cotton Committee recently issued a treatise on the above subject prepared by Dr. Nazir Ahmad, the Director of their Technological Laboratory, Matunga, Bombay (Technological Bulletin, Series A, No. 41).

A 100-lb. sample of P.A. 4F was passed through the blow-room and at the finisher scutcher was divided into 5 equal-sized laps, A, B, C, D

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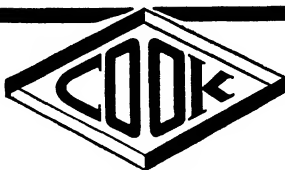
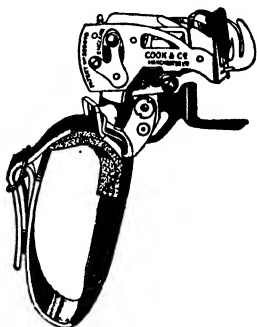
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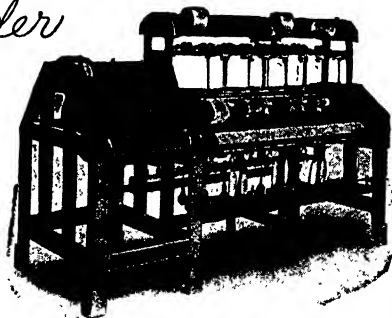
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and E, which were carded separately to yield sliver of 0.15, 0.13, 0.11, 0.175 and 0.19 hank respectively. Each sliver was given two heads of drawing with a draft of 5.93 in each drawing frame. These were then processed with 15 different schemes of drafts in the speed frames and spun into 20's counts and the yarns obtained were examined for strength, evenness, etc. The following conclusions are drawn :—

(1) The least number of breakages in the ring frame was obtained by the normal scheme of drafts. They were found to increase as the finisher sliver became coarser, and in such cases relatively fewer breakages were obtained when the additional draft was uniformly spread out over the four frames. They were also more numerous if, consequent on the omission of a frame, the drafts in the other frames exceeded a certain value.

(2) When the hank number of the sliver was decreased, the yarns were found to become somewhat less even, and the effect, as a rule, is more marked if the extra draft required is concentrated in fewer machines. The yarns spun from the lighter sliver D (0.175 hank) with the omission of the intermediate frame are somewhat less even than those obtained from the heavy sliver C (0.11 hank). This tendency to yield less even yarns was shown in a greater measure by the still lighter sliver E (0.19 hank). This feature is probably due to a poorer orientation of the fibres caused by a reduction in the lateral cohesive forces arising out of the attenuation of the sliver.

(3) The best strength results were given by the scheme of drafts normally employed at the Laboratory. Further, the variation in yarn strength, by using different schemes of drafts in the fly frames and the ring frame, was found to be quite small, for the limits of drafts employed in these tests. When somewhat high drafts are necessitated either by the use of a coarse roving or by the omission of a process, the strength is likely to fall, beyond certain values of the drafts, the decrease in strength being greater when the extra draft is concentrated in the ring frame than if it is spread out in all the four machines.

(4) The effect of employing different schemes of drafts, in relation to yarn strength on the one hand and the output and the number of spindles on the other are discussed, and some typical cases in which without any appreciable reduction in yarn strength, either the output can be increased or a certain amount of saving in labour, supervision, etc., can be effected are considered in detail.

IS HEMP TO REPLACE COTTON IN U.S.A. ?

The following article by George A. Lowry which appeared in the *Manufacturers' Record*, of Baltimore, gives rise to doubts as to whether America will continue to produce cotton to the same extent as hitherto. Will the cotton mills of the world have to buy more cotton from India, Brazil, Egypt and the Argentine, etc. ? Another thought suggested by the

article is that some day each country may produce sufficient cottonised flax or hemp to replace cotton in its own domestic mills.

"The rapid increase in cotton growing abroad under conditions and costs with which we (in U.S.A.) cannot compete, and which will surely result in a rapid decline in our production, makes it imperative that consideration be given to the finding of substitutes that we can grow to advantage and use in our present mill equipment.

We may hold our own for a time on our Sea Island and other long fibred cotton but for the greater part of our 26,000,000 spindles, the future looks discouraging.

The question of lower wages abroad is, of course, a serious one but not by any means the only one. In the countries with which we must compete, the growers are not dependent on the success of any one of their crops. They usually have a rotation of five crops, over which their yearly costs and labour are expended; so that the failure of any one crop is not so serious a matter as it is to our many one-crop farmers.

The Agricultural Department and State Agricultural Colleges are trying to get our planters to grow several crops to occupy more of their time and not throw the burden on any one crop; but nearly fifty per cent. of them will not stay long enough on one location to give it a good trial, so that any relief from that source looks as if it would come slowly, if at all.

The oldest soils of the old world are the most productive, while our oldest soils have been improvidently used up.

Aside from the purely tropical, we have an infinite variety of soil and climate and can grow virtually anything the rest of the world produces; but in order to avoid failure we must understand what our competition is and not build too much on our mechanical ability to overcome their labour costs. For instance:

In Minnesota, Wisconsin and Dakota there were several million acres of marsh lands considered of little value and producing a wire grass suitable for matting. Machinery, nearly automatic, was developed to utilise this otherwise waste material and factories were producing fifteen million square yards per year; but the Japanese put their women and children to work in their own homes straightening rice straws; Tokio merchants supplied them with cotton warp and hand looms, then they came around and collected the matting, put braid on it and stamped patterns on it and shipped it in the empty tank steamers returning to the United States at prices much below the cost of wire grass rugs. In looking over the field for substitutes it is well to give attention to the foregoing possibility.

Recent progress in mechanics and chemistry have made it entirely practical and profitable to compete with the rest of the world on the two great fibres—flax and hemp. Flax fibres are apparently about thirty inches long and hemp six to eight feet long but they are really made up of fibres about the same length and diameter of cotton and can be manufactured on cotton mill equipment. Hitherto the woody portion of the stalks which make up seventy to eighty per cent. of the straw has been a complete waste, but this can now be made into wood flour and used in plastics at prices to more than cover the cost of producing the crop.

These straws as handled abroad would not do for plastics as they have been retted before decorticated and their valuable ingredients destroyed.

Mechanism has been devised to decorticate (clean) flax and hemp as it comes from the field and dry it without injury to either the fibre or the woody portion of the stalk ; and instead of the objectionable retting to get rid of the gums it is now done chemically in less hours than it takes weeks by present prevalent methods and with less severe chemicals than those hitherto used. This is done at only a fraction of present labour costs and with a resulting yield of over ninety per cent. more spinnable fibre.

Flax, cotton and hemp fibre have the same amount of cellulose. The gums and waxes when recovered from flax have a higher melting point than beeswax. The chemical used in degumming flax is also recoverable. In fact there is a possibility that the by-products now being developed may reduce the cost of these most valuable fibres to less than half of what they can be produced for elsewhere.

Flax seed is now an important item of production in this country but we are still importing more than we grow.

Because, until recently, there has been no means of cleaning flax straw under sixteen inches the greater part of several million tons is now burned yearly to get rid of it.

As there has been no market for the straw it is allowed to become too ripe before harvesting and this does not make good fibre. Recent tests have shown that when flax is planted close together to avoid branching and when harvested at the right time, a very good fibre can be obtained without any damage to the seed.

In Europe they save both the seed and fibre from fibre flax and there is practically no distinction between the fibre flax seed and the seed flax seed except in the matter of a little more oil in the seed of the over-ripe straw.

To those interested in utilising this most valuable of waste fibres (seed flax fibre), it might be done by buying the crop as it stands on the basis of its probable yield of seed (which is all the farmers now get from it), then harvesting it at the right time and saving both seed and fibre ; much along the same lines as is now done with many fruit and vegetable crops.

Farmers to whom this has been suggested have in each case liked the idea. Mechanism for threshing and decortivating the crops can be mounted on trucks and driven from the power of the trucks. Usually, though, the crop is grown in tracts large enough to make local plants advisable.

Most of the fibre flax is now grown in Oregon but it has been grown in every state of the union and with locations selected with the right soil and moisture, it can be a most profitable crop.

Hemp also is an easy crop to grow but has been limited in this country to the demand for the fibre for rope purposes. It produces about a thousand pounds of fibre per acre and this, when chemically degummed, makes very fine fabrics. It has plenty of absorption and it is stronger than cotton or flax."

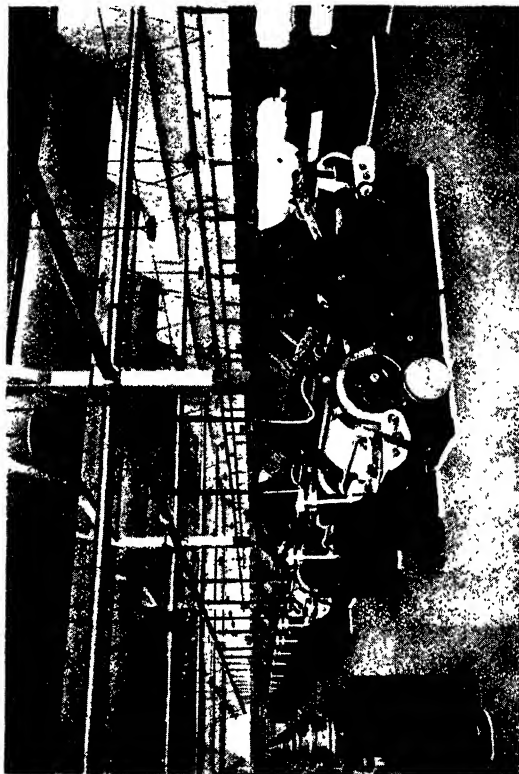


Works at
MULHOUSE
(Haut-Rhin) and
GRAFFENSTADEN
(Bas-Rhin).

SOCIÉTÉ ALSACIENNE DE CONSTRUCTIONS MÉCANIQUES MULHOUSE (France)



Cableworks at
CLICHY (Seine)

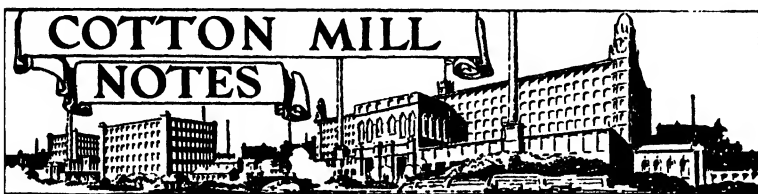


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MILLS**





CANADA.

The first Special Order under the Ontario Minimum Wage Act, as amended in 1937, was issued in January, and is applicable to all workers in the cotton and wool textile industry of the Province. The Order prescribes minimum wage rates, for regular weekly hours, of 16 dollars for adult male workers (aged 21 years and over) and 12.50 dollars for adult female workers (aged 18 years and over), with minimum rates for younger workers varying from 9 to 15 dollars according to age and sex. Regular weekly hours are defined as the weekly number of working hours which has prevailed hitherto in the individual undertaking, subject to the maxima laid down in the Minimum Wage Act, 1937, *viz.*, 48, 50 or 54 hours a week according to the population of the locality. Minimum hourly rates for the first two hours of overtime are fixed at 40 cents for adult male workers and 31.25 cents for adult female workers, with lower rates for younger workers. All other overtime is to be paid at 50 per cent. above normal wage rates. In undertakings situated in towns of less than 10,000 inhabitants, the minimum rates prescribed for women and girls may, until August 1, 1938, be reduced by 10 per cent. For part-time workers (i.e., workers engaged for a period in each week or day less than the regular weekly or daily hours of the undertaking), the prescribed minimum rates are increased by 25 per cent. Wages are to be paid for all time spent in the undertaking by the worker while waiting for work. Piece workers are guaranteed earnings equivalent to the corresponding minimum time wage, unless the piece rate is such that 80 per cent. of a group of at least five persons, working at the rate under the same conditions, are able to earn the equivalent of the corresponding minimum time wage. It is understood that the Order, which took effect on March 1, 1938, is of a temporary character and will probably be replaced by a permanent regulation after the publication of the Report of the Royal Commission on the Textile Industry in Canada.

(Ministry of Labour Gazette)

Consumption of raw cotton by Canadian mills during February showed a decline of 10.79 per cent. from the total of the preceding month according to the index of consumption of equivalent 500 lb. gross bales. Consumption amounted to 16,449 equivalent 500 lb. bales in February, as compared with 18,437 in the previous month, the index for February

standing at 101.4, as against 117.6 for the preceding period. Seasonal factors have been included in calculation of the index, the decline in activity in the cotton mills and in the textile industry in general being caused, it is stated, by a combination of factors which are at present affecting the industry, in addition to the general business recession of recent months.

(*Manchester Guardian*)

REGIONAL DIFFERENCES IN U.S. COTTON-TEXTILE WAGES, 1928 TO 1937

By N. A. TOLLES, Bureau of Labour Statistics.

The following is extracted from an article which appeared in the U.S. *Monthly Labour Review*, Jan. 1938. The article was reproduced and forwarded to us by the National Association of Cotton Manufacturers, Boston.

The spread between cotton workers' earnings in the North and the South increased during the year ending July, 1937. Previously, during the 10 years 1925-34, regional differences in the cotton-textile industry had been generally decreasing. This trend was reversed after 1935. By July, 1937, northern cotton mills were reporting the payment of an average of 50.0 cents an hour, as compared with the average of 39.7 cents reported by southern mills. Such a regional variation in average hourly earnings, although smaller than during the period 1924 to July, 1933, was definitely larger than any which had prevailed during the operation of the cotton-textile code under the National Recovery Administration.

Earnings' figures are not conclusive as to the absolute amount of competitive advantage at any one time as between mills or regions. In the cotton-textile industry, regional contrasts in average hourly earnings are probably somewhat greater than competitive differences between regions as regards unit labour cost. Some of the northern mills produce textiles which are not directly competitive with the southern products. The higher wages paid to the more skilled labour employed in such northern mills may involve them in no competitive disadvantage. In addition, man-hour productivity in the North may be somewhat higher than in the South and in such a case the regional difference in hourly earnings would be greater than the difference in unit labour cost, even for mills with similar products. But, in the absence of marked regional shifts in products or skills during the recent brief period of wage change, it is clear that the southern mills could compete more advantageously in July 1937, when the difference between the regional averages was 10.2 cents an hour, than in July 1936, when this difference had amounted to 7.2 cents an hour.

MOVEMENT OF HOURLY EARNINGS IN THE NORTH AND SOUTH, 1928-37.

The contrast between average hourly earnings in northern and southern mills reached a maximum in 1924 when the weighted average ratio showed southern earnings to be 39 per cent. less than northern earnings for similar classes of cotton workers. This regional difference was narrowed during the next 10 years—gradually from 1924 to 1933 and suddenly at the beginning of the N.R.A. period. By 1928, after northern earnings had been cut, cotton workers were still earning 31 per cent. less per hour in the South than in the North. These regional differences in earnings during the 1920's did not lead to stability in the industry, as is shown by the rapid shift of cotton spindleage from North to South during that period. The amount of the North-South wage difference continued to decrease slightly during the depression, as wages fell generally, but in July 1933, just before the N.R.A. code became effective, hourly earnings in the South still averaged 26 per cent. below those in the North. The differentials based on weighted occupational ratios also narrowed between 1930 and 1932, but widened thereafter to return to the 1930 position by July 1933. The closing of the regional differential between 1930 and 1932 was clearly due to more drastic wage cuts in northern mills. The divergent trends from 1932 to July 1933, as between the two types of differential, suggest that the more drastic wage cuts in southern mills toward the end of the depression were being offset by more extensive substitution of unskilled for skilled classifications of workers in the North.

The cotton-textile code sharply reduced the percentage difference in wages between North and South by effecting an increase of hourly earnings in the South in greater ratio than the increase in the North. During the single month, July to August 1933, the difference fell from 26 to 18 per cent. This influence continued to spread during the first year of the code, so that by August, 1934, the average hourly earnings of southern cotton operatives were only 15.6 per cent less than those of northern operatives. The code provided for a minimum rate of 30 cents an hour in the South and 32½ cents in the North, a differential of 8.3 per cent. The minimum rate prevailed more widely in the South than in the North, partly because the increases called for in the South were substantially larger than those called for in the North. For example, female filling hands in the South averaged 13.7 cents an hour in July 1933, and 30.7 cents in August 1934. Female spinners averaged 16.1 cents and 32.1 cents in the two periods. In other words, the great majority of spinners as well as filling hands were at the 30-cent minimum. Even in the case of spinners hourly earnings were doubled, but the differential between the two occupations in the South was reduced from 2.4 cents an hour to 1.4 cents. In the North, female filling hands were increased from 20.2 cents to 33.5 cents, whereas spinners went from 23.9 cents to 37.8 cents an hour. The increases amounted to 66 per cent. and 58 per cent. respectively; the differential between the occupations was essentially maintained. While filling hands were paid at the minimum rate in the North almost as frequently as in the South, this was not true of spinners.—(U.S. Bureau of Labour Statistics. Textile Report, Part I: Wage

Rates and Weekly Earnings in the Cotton Goods Industry from July 1933 to August 1934, pp. 38-39. Washington, February 1935.)

After the N.R.A. codes ceased to operate, wage differences increased generally as between industries, occupations, establishments and regions. In the cotton-textile industry, the gap between northern and southern wage rates increased immediately after the code and again during the fiscal year 1936-37. During the first year following the code, the general level of hourly earnings in the cotton-textile industry declined by about 3 per cent. An identical sample of 448 mills reported an average decline of 3.2 per cent. from April, 1935 to April, 1936. During the year 1935 as a whole, including 5 months of code operation, hourly earnings in the South averaged 17.5 per cent. below those in the North. During most of the year 1936 the relative levels of earnings in the North and South appear to have remained fairly stable. Substantially the same ratio of hourly earnings in the two regions was found in July 1936, as that which had prevailed during the year 1935. By July 1937, however, average hourly earnings in southern mills were 20.6 per cent. below those in northern mills.

COMPARISON OF AVERAGE HOURLY EARNINGS IN NORTHERN AND SOUTHERN COTTON-TEXTILE MILLS, 1928 to JULY, 1937.

Period	(1) Unweighted Averages		(2) Weighted Averages	
	North	South	Per cent. South of North	Per cent. South of North
	cents	cents		
1928	39.4	27.3	69.3	69.6
1930	39.7	28.1	70.8	71.9
1932	32.3	23.9	74.0	79.5
July, 1933	27.6	20.5	74.3	72.2
August, 1933	41.1	33.7	82.0	86.3
August, 1934	42.2	35.6	84.4	85.5
1935	42.2	34.8	82.5	(3)
July, 1936	41.8	34.6	82.8	(3)
July, 1937	50.0	39.7	79.4	(3)

(1) The average hourly earnings shown are not strictly comparable from one period to the next, being based on changing samples. The ratios of southern to northern earnings are less affected by such changes in the sample. None of the unweighted averages have been published hitherto. The sources of the earnings figures are as follows:—1928—August, 1934—field studies of the Bureau of Labour Statistics; 1935—man-hour reports of the Census of Manufactures, prepared for the Bureau of Labour Statistics by Arthur F. Beal (total of cotton yarn and cotton woven goods); July, 1936—July, 1937—regional tabulation of employers' reports to the Bureau of Labour Statistics.

(2) Monthly Labour Review, May, 1935, p. 1173. Averages of the ratios of southern to northern earnings for each occupation and sex, weighted by the average numbers of workers in same class as found in the Bureau's field studies of 1924 to 1930. The percentages as previously published have been converted from a southern to a northern base to facilitate comparison with the percentages shown in column 3.

(3) Not available.

POPE PROCESSING TAX BILL

Calculated to raise upward of \$200,000,000 annually to finance benefit payment provisions of the new farm programme, the Pope Bill imposing a schedule of processing taxes or "tariff equalisation fees," as they are identified in the Bill, on cotton, synthetic yarn, corn, wheat, rice and tobacco was introduced in the United States Senate recently.

Intended to be offered as an amendment to the general tax revision Bill now before the Senate Finance Committee, the measure provides for taxes ranging from .5c. to 6c. a pound on cotton yarn; 6c. a pound on synthetic yarn; .3 to .5c. per pound on wheat flour; .06c. to .33c. per pound on corn products; .5c. per pound on rice; 1c. per pound on manufactured tobacco and from 3c. to 10c. per thousand on cigars and cigarettes.

Dr. Claudius T. Murchison, President of the Cotton-Textile Institute, upon learning of the Pope Bill issued the following statement:--

"The news of Senator Pope's action fell like a bombshell into the ranks of the cotton textile industry. Until the news was received it had seemed incredible that any further blow could be struck at this industry already prostrate under the weight of the bitterest depression it has ever known. A processing tax such as is proposed can have no other effect than to diminish still further the already shrunken demand for cotton goods.

"Cotton mills generally throughout the industry have been operating for months at less than two-thirds of capacity and in many cases have continued to operate on the reduced schedules only to furnish much needed employment for their workers."

(New York Journal of Commerce)

U.S. COTTON TEXTILE AND BRITISH TRADE PACT

According to reports from Washington, representatives of United States cotton textile manufacturers appeared before the Committee for Reciprocity Information recently with vigorous protests against promulgation of an agreement with the United Kingdom and the British Colonial Empire.

Leading the cotton textile delegation were Dr. Claudius T. Murchison, President of the Cotton-Textile Institute Inc., and Russell T. Fisher, of the National Association of Cotton Manufacturers, both of whom detailed the industry's current plight and strongly urged against tariff concessions on those products already competing with the American-made article. Both protested against "inadequacy" of existing tariff rates.

TEN YEARS OF COTTON TEXTILES

Data assembled by The Association of Cotton Textile Merchants of New York from Bureau of The Census reports and information obtained through the courtesy of machinery manufacturers. Cloth production for the non-census or even years and for 1937 has been estimated to correspond to spindle hour activity during the preceding census years.

	1928	1929	1930	1931	1932	1933	1934	1935	1936	1937	1938
EQUIPMENT											
Spindles in place at beginning of year.....	36,465,976	37,267,086	34,541,486	31,608,494	32,326,526	31,442,174	30,938,340	30,889,484	29,213,444	27,700,194	26,704,476
Increase or decrease from preceding year.....	-898,754	-1,198,890	-725,600	-912,992	-1,281,968	-884,352	-103,814	-48,816	-1,636,040	-1,553,250	-991,718
New installations, additions and replacements.....	215,912	350,784	251,936	205,068	145,908	348,768	529,840	214,874	469,316	772,724	
OPERATION											
Spindles active at any time during year ending July 31st.....	33,569,792	32,417,036	31,245,078	28,979,646	27,271,938	26,894,860	27,742,462	26,700,946	24,664,428	25,419,110	
Spindles idle during same period.....	2,896,184	2,850,050	3,296,408	4,628,848	5,054,588	4,547,314	3,197,878	4,188,538	4,549,016	2,281,084	
Average number of active spindles on monthly reports.....	29,561,648	30,408,548	27,269,470	25,674,107	23,310,777	24,873,270	25,119,435	23,421,150	23,373,147	24,079,936	
Intermittent spindles (those active at some time during year).....	3,608,144	2,008,488	3,975,608	3,305,539	4,021,181	2,021,590	2,623,027	3,279,796	1,391,281	1,339,174	
Percentage relation of average active spindles to spindles in place.....	82.16%	86.22%	78.95%	76.39%	71.92%	79.11%	81.19%	75.82%	79.9%	86.93%	
Spindle hours run.....	92,728,880,678	99,899,724,476	76,702,655,168	77,793,298,853	70,218,347,911	86,180,232,838	75,711,481,882	76,017,361,934	91,773,257,676	95,591,131,816	
Hours run per average active spindle.....	3,095	3,285	2,813	3,030	3,020	3,481	3,014	3,246	3,926	3,970	
MARKET											
Production in square yards.....	7,846,440,000	8,398,616,000	6,448,392,000	6,951,391,000	6,278,222,000	7,866,040,000	6,878,479,000	7,150,246,000	8,632,192,000	8,991,302,000	
Exports in square yards.....	546,847,000	564,444,000	416,285,000	366,959,000	375,446,000	302,042,000	226,306,000	186,565,000	200,501,000	236,251,000	
Imports in square yards.....	61,297,000	61,185,000	37,517,000	34,732,000	29,436,000	41,348,000	41,533,000	65,674,000	114,195,000	147,330,000	
Available for domestic consumption.....	7,360,888,000	7,895,377,000	6,067,624,000	6,623,164,000	5,932,210,000	7,607,346,000	6,693,866,000	7,027,315,000	8,545,886,000	8,902,371,000	
Population at July 1st.....	119,799,000	121,526,000	123,091,000	124,113,000	124,974,000	125,770,000	126,626,000	127,521,000	128,429,000	129,277,000	
Available for per capita consumption in square yards.....	61.44	64.97	49.29	53.36	47.47	60.47	52.86	55.11	66.54	68.87	

THE COTTON INDUSTRY IN DENMARK

The following interesting observations concerning the Danish cotton industry are contained in a "Report on Economic and Commercial Conditions in Denmark," prepared by the Commercial Secretary to H.M. Legation at Copenhagen. The Report is printed and published for the Department of Overseas Trade by H.M. Stationery Office, London.

Five cotton spinning mills, employing over 2,000 operatives, produced 7,465 tons of yarns in 1936, i.e., 204 tons more than in 1935, but 167 tons less than in the record year of 1934. Such was the demand that, although the mills worked two and even three shifts, practically the whole year, they were unable to meet it and imports went up. Prices have, on an average, been kept slightly below United Kingdom quotations. The following table shows the production according to counts :—

	Kilos			
Below No. 18	3,395,000			
From No. 18 to 33	2,620,000			
Finer than No. 33	215,000			
Twisted yarn	1,235,000			

One mill also produced 70 tons of artificial cotton yarn which apparently sold at favourable prices. Sewing cotton is not produced in Denmark.

Of the total consumption of yarns 77.4 per cent. was satisfied by local spinners in 1936, as compared with 80.8 per cent. in 1935. The following table shows the consumption of cotton yarns according to industries, and the amount supplied by Danish spinners :—

	Total consumption			Of which Danish yarns		
	Tons			Tons		
	1934.	1935.	1936.	1934.	1935.	1936.
Cotton weaving ..	5,375	5,115	5,537	4,865	4,569	4,804
Knitted goods ..	1,956	1,917	2,124	1,203	1,219	1,331
Woollen and worsted	348	392	389	313	364	360
	<u>7,679</u>	<u>7,424</u>	<u>8,050</u>	<u>6,381</u>	<u>6,152</u>	<u>6,495</u>

BELGIUM

Prior to March 1, 1938, workers employed on the shift system in the textile industry of East and West Flanders were working 48 hours a week in some undertakings and 46 hours 30 minutes in others. As from the date mentioned, the working time of all textile workers employed on the two-shift system in Flanders was fixed at 7 hours 45 minutes a day or 46 hours 30 minutes a week, and, except in undertakings in which shift-working had already been taken into account in fixing wage rates, the existing supplements to hourly wage rates and list rates of 3 or 6 per cent. were raised to 9 per cent. in all cases. These changes were carried out in

accordance with an agreement concluded on November 27, 1937, by the Joint Committee for the Flemish textile industry. Under the same agreement, night workers had received considerable increases in wage rates, which made it possible for them to earn in 40 hours, spread over five nights, the equivalent of the weekly wage of day workers. The agreement relates exclusively to work organised in shifts, and no general reduction in working hours in the textile industry is contemplated, both employers' and workers' representatives recognising that the possibility of such general reduction is limited by international factors.

(*Ministry of Labour Gazette*)

INDIA

In the foreword to its report for 1937 the Bombay Millowners' Association states that the industry as a whole has done better since the middle of 1937 than for the past seven or eight years, but, in its opinion, the present prosperity is mainly a result of the Sino-Japanese situation, which cannot be looked upon as a permanent factor. After tracing the fluctuations in the prices of Indian cotton during the year, the foreword points out that the position in the cloth and yarn markets was affected by the imposition of quotas on Japanese goods in foreign markets, by the conflict in China, and the pre-occupation of textile exporting countries with production for the Army. These three factors helped Indian mills to secure considerable business for export, but for which the position of the industry would have been difficult. The industry not only increased its production by working more spindles and looms double-shift but also disposed of this increased production, and for the first time in many years the industry worked without loss. Thus the Bombay mills increased their spinning and weaving activity by about 15 per cent. by the end of the year as compared with the beginning of the year.

JAPAN

According to a recent issue of the *Manchester Guardian*, a new plan is now being considered in connection with the supply of raw cotton to Japanese cotton mills. Instead of allowing the cotton industry 350,000 bales of raw cotton per month for all its requirements it is understood that there will be a specific allowance of 100,000 bales per month for goods for the domestic market, while permits will be granted for cotton for export goods up to 60 per cent. of the value of cotton cloth exports. In this way it is hoped to provide an adequate supply of cotton for the home market and to stimulate efforts to increase export trade while preventing uneconomically large imports of the raw material. Stricter control will be exercised over spinning and weaving, and special measures may be taken to promote business with countries where Japanese goods encounter especially great difficulties.

W.P.A. TO RESUME TEXTILE PURCHASES IN U.S.A.

The Works Progress Administration recently announced in Washington that it would undertake the immediate purchase of 35,000,000 yards of cotton textiles.

The programme adopted after conferences held by President Roosevelt with W.P.A. Administrator Harry Hopkins and Congressional leaders from cotton textile States is designed to aid the industry in maintaining employment and production levels at this time.

During the last fiscal year, W.P.A. purchased in the neighbourhood of \$15,000,000 worth of cotton textiles for relief distribution through sewing-room projects throughout the country. Further large purchases are expected to be announced, when, and if, Congress approves the \$1,250,000,000 asked by President Roosevelt to carry the relief agency through the seven months from the beginning of the coming fiscal year July 1 to February next year.

Purchases of textiles under the programme announced will be conducted through the Division of Procurement, Treasury Department, under the usual bid and contract procedure for all works programme materials, it was stated.

Types of textiles to be purchased, according to listings by the Works Progress Administration, include cotton prints, bird's-eye, denim, nainsook, outing flannel, muslin, shirting, corduroy and twill.

Schedules and bid invitations on the materials to be bought will be issued as soon as possible, it was stated.

Textile States representatives in the House and Senate led by Senator James F. Byrnes (Dem., S.C.) proposed the programme of lumping together all possible W.P.A. Textile purchases and making them immediately. They hope through the programme to bring about some measure of improvement in the textile industry which has felt the present business recession acutely.

It had been expected that the purchases announced by W.P.A. would be much larger than 35,000,000 yards, but officials pointed out that the agency was "buying with what funds we have now," indicating that further lump purchases will be made as soon as more money is available.

W.P.A. now operates approximately 9,000 sewing rooms in every State of the union, employing 165,000 needy women. Garments and household articles made by these workers are distributed through public relief agencies.

COTTON SPINNING MILLS IN AUSTRALIA

All the cotton spinning and weaving mills in Australia are located in the Southern States, there being three mills in Melbourne and three in Sydney.

During 1937, all cotton spinners have increased their business to a very considerable extent, and for certain cotton piecegoods and knitted goods, which are fully protected, the Australian spinners and manufacturers are now supplying the total requirements of the Australian market.

The consumption of raw cotton in Australia for 1937 by cotton spinners will be certainly not less than 25,000 bales of raw cotton, and as the production in Queensland only amounted to 8,519 bales it meant that Australian spinners were under the necessity of importing from overseas sources an amount of 16,500 bales of raw cotton.

This cotton was imported from the United States of America and India, the greater proportion being obtained from India, such Indian raw cotton being of inferior quality when compared with the quality of raw cotton produced in Queensland.

The successful expansion of the cotton spinning and manufacturing industries in Australia under the assistance granted by the Commonwealth Government through adequate protection on the particular classes of goods being manufactured indicates that there are great economic possibilities for the further and very considerable expansion of the cotton spinning and manufacturing industry in Australia.

Cotton spinners in Australia have overcome their initial difficulties, and are now operating on an efficient basis quite comparable to the efficiency of cotton spinning and weaving mills in other overseas countries.

Obviously, the next step is for the protection of a greater variety and range of cotton goods which can be manufactured in Australia, and by following this plan step by step progressively the ultimate object can be obtained in Australia where practically the whole of the cotton goods requirements of this country will be manufactured here.

(Extract from the Annual Report of the Queensland Cotton Board)

JAPANESE COTTON MILLS IN CHINA

The following is extracted from an article which appeared in the March 1938 issue of the *Oriental Economist* :

In contrast to the almost negligible damage done to Japanese owned cotton mills in Tientsin and Shanghai, those in Tsingtao have suffered so severely that almost all of the 523,000 spindles contained in nine mills have been destroyed, involving a 200,000,000 yen property loss. The only mill spared was a Chinese-owned one with 48,000 spindles. Plans are afoot to rebuild nine cotton mills in Tsingtao on the basis of 50,000 spindles and 1,000 looms per mill, aggregating 450,000 spindles and 9,000 looms. However, it will take time to clear the sites for the new structures ; the supply of building materials, especially bricks, is limited ; and the restoration of power stations and water supply systems will be extremely difficult. Consequently many are of the opinion that it will be two to three years before the reconstructed mills are ready for operation. It is

certain that the Tsingtao mills, which in recent years shipped a large amount of cotton yarns and piecegoods to Tientsin and Shanghai, will not be in a position to do so for the next couple of years, and meantime, Tientsin will not only produce no cotton goods but will be a consuming centre.

On the other hand, of 2,640,000 cotton spindles in Shanghai (of which Japanese own 1,330,000, Chinese 1,080,000, and other foreigners 230,000) only 180,000 in three Japanese-owned mills have been completely demolished. It is true that other mills have been more or less damaged, but they can be repaired without much difficulty and resume operations any time. In fact, some 2,460,000 spindles in Shanghai are practically intact and ready for operation. However, the population has been badly stricken by the hostilities and its purchasing power so greatly reduced that for some time to come the demand for most cotton goods will probably be small. Consequently, the mills in Shanghai will have to find outlets for their products in other parts of China and in foreign countries, and it will be interesting to note the effect of this situation on Tientsin.

Records show that Tientsin received from other parts of China 109,000 bales of yarns and 122,000 bales of piecegoods in 1935; 96,000 bales and 126,000 bales respectively in 1936; 66,000 bales and 78,000 bales respectively in 1937. While the assortments change from year to year according to circumstances, the principal suppliers are Shanghai 60% to 70% and Tsingtao only 30% to 40%. This traffic has tended to shrink year by year as the production capacity of Tientsin's mills has expanded, but undoubtedly it has exercised appreciable pressure on Tientsin products. Nevertheless, for the next two or three years, Tsingtao may not ship any cotton goods, and shipments from Shanghai for some time may be directed to Tsingtao to fill the deficit there. Consequently the Tientsin cotton mills not only will be relieved of competition from the mills in Tsingtao and Shanghai, but may have the opportunity of entering the Tsingtao market in competition with shipments from Shanghai.

It is also interesting to note that Japanese mills are gainers from the present hostilities in that they are no longer under pressure from Chinese mills. Under the Five Year Economic Construction Plan, Chinese mills in recent years have been offering vigorous competition to Japanese mills in China, but the emergency has so changed the situation that Japanese mills are in an advantageous position to compete in developing markets in the interior.

A survey conducted immediately before the outbreak of the Sino-Japanese hostilities showed that expansion programmes of Chinese mills in all parts of China involved 480,000 spindles, or an increase of only 18% over the then outstanding spindlage. A remarkable aspect of this expansion schedule was that only 73,000 spindles were allocated to open ports such as Shanghai, Tsingtao and Tientsin, whereas the balance of 407,000 spindles, or 84% of the prospective increase, were to be installed at various points in the interior.

The implication of the Chinese policy was clear. The Chinese were then erecting modern mills in the chief cotton producing centres of the interior in order to assure for themselves both a monopoly of the domestic market demand and the power to direct into foreign outlets the movement of the products of Japanese mills, which could not locate outside the open ports. This would have helped to improve China's position in international payments.

Both the National Government and provincial authorities supported this idea with considerable enthusiasm, but the grand scheme died a premature death owing to the outbreak of the emergency. An expansion programme of this extent, it is true, may have not proved much of a menace to the Japanese mills, but had it made much progress there is no doubt that it would have worried the Japanese owners who were then busy carrying through an ambitious plan of their own to increase spindleage.

The establishment of a new government regime in North China has given Japanese spinning interests an opportunity to locate their mills far in the interior, whereas previously they were limited to the open ports. Already the Japanese owners in Tsingtao are considering a removal of their mills to Tsinan, the capital of Shantung Province, instead of reconstructing them in Tsingtao. Reports indicate that one Chinese mill in Shihchiachuang has resumed operations under the management of the Kanegafuchi Spinning Company, while negotiations are being carried on by Japanese interests for the purchase of or merger with many Chinese mills in the interior.

From the short swing viewpoint, the cotton goods demand in the Tientsin area is destined to contract to some extent because of the community's curtailed purchasing power. This tendency, however, will be offset by less intense competition from other cotton centres in China and a complete stoppage of the low duty imports through East Hopei. As soon as peace and tranquility are restored in the interior and the consumer demand rises, the cotton mills in Tientsin should fare reasonably well.

Expansion programmes of Japanese mills in Tientsin which are scheduled for completion by the end of the current year, involve the installation of 465,000 additional spindles and 10,800 more looms. Tientsin would then boast 677,000 spindles and 12,800 looms under Japanese control and 63,000 spindles and 500 looms under Chinese control.

There is some doubt about expansion schemes for several Tientsin mills which are scheduled for completion during 1939 and onward. The rise of the new Peiping regime and the consequent freedom to locate mills anywhere they please may induce Japanese spinning interests to establish mills in sections of China where there are immense consumer markets near at hand and where facilities for obtaining raw cotton are unexcelled, instead of remaining in the less favourably situated open ports.

COTTON TRADE STATISTICS

INDIA

IMPORTS OF COTTON YARNS AND PIECEGOODS.

Figures for the nine months April 1st to December 31st, 1937.
(Prepared by H.M. Senior Trade Commissioner in India and published
by the Department of Overseas Trade, London.)

Cotton Yarns.—The aggregate volume of this trade suffered a sharp decline and a smaller reduction in value, from 23 million pounds valued at Rs.2 crores to 16 million pounds valued at Rs.1.88 lakhs. The share of the United Kingdom declined in quantity but appreciated in value from 5.8 million pounds, value Rs.57.9 lakhs, to 5 million pounds, value Rs.62.2 lakhs. The share of Japan similarly showed a reduction in quantity, but an advance in value, from 12½ million lbs., value Rs.1.05 lakhs, to 10.8 million lbs., value Rs.125 lakhs. The arrivals from China practically disappeared from 4¾ million lbs., value Rs.36.3 lakhs to the negligible quantity of 14,000 lbs., value Rs.0.17 lakh.

Grey Piecegoods (Plain Grey).—The import trade in these goods also showed a sharp contraction, from 137 million yards valued at Rs.160 lakhs to 60 million yards valued at Rs.88 lakhs. Nearly 90 per cent. of this trade in value is enjoyed by Japan, whose sending declined from 127 million yards, value Rs.146 lakhs, to 54 million yards, value Rs.77 lakhs, and the small share of the United Kingdom declined from 9.3 million yards, value Rs.14 lakhs, to 6.1 million yards, value Rs.11 lakhs.

Grey Piecegoods (Bordered Grey).—The aggregate value of this trade declined by more than 60 per cent., from 73 million yards valued at Rs.102 lakhs to 23.6 million yards valued at Rs.37 lakhs. The share of the United Kingdom fell from 30 million yards, value Rs.53.3 lakhs to 10¾ million yards, value Rs.20.9 lakhs. The arrivals from Japan declined from 42.4 million yards, value Rs.49 lakhs to 12.8 million yards, value Rs.16.2 lakhs.

White Piecegoods (Bleached).—There was very little change in the aggregate trade in these goods, the arrivals in the period under review totalling 154 million yards valued at Rs.319 lakhs as compared with 162 million yards valued at Rs.323 lakhs in the corresponding period of 1936. More than 60 per cent. of this trade is enjoyed by the United Kingdom, whose sendings showed some decline from 118 million yards, value Rs.244

lakhs, to 99 million yards, value Rs.217 lakhs. The arrivals from Japan advanced somewhat from 39 million yards, value Rs.59½ lakhs to 48 million yards, value Rs.74½ lakhs. The sendings of Switzerland also showed a small increase from 3 million yards, value Rs.12¾ lakhs, to 4½ million yards, value Rs.20 lakhs.

Printed Piecegoods.—There was some reduction in the aggregate trade from 149 million yards valued at Rs.235 lakhs to 114 million yards valued at Rs.200 lakhs. The majority of this decline was suffered by Japan, whose sendings contracted from 112 million yards, valued Rs.152 lakhs, to 78 million yards, value Rs.119 lakhs. The shipments from the United Kingdom fell only slightly from 37½ million yards, value Rs.82½ lakhs, to 35 million yards, value Rs.77½ lakhs.

Dyed Piecegoods.—There was some increase in this trade from 60 million yards valued at Rs.151 lakhs to 67 million yards valued at Rs.181 lakhs. The great bulk of this trade is enjoyed by United Kingdom manufacturers, whose sendings were 45 million yards, value Rs.134 lakhs in the period under review, as compared with 45¾ million yards, value Rs.122 lakhs in the corresponding period of 1936. The comparatively small share of Japan registered some increase from 11 million yards, value Rs.19 lakhs to 17½ million yards, value Rs.32 lakhs. The arrivals from Switzerland advanced from 2.1 million yards, value Rs.6¾ lakhs to 2½ million yards, value Rs.9½ lakhs.

Woven Coloured Piecegoods.—There was some contraction in the quantity of this trade, but a small increase in value, from 11¼ million yards valued at Rs.30½ lakhs to 9 million yards valued at Rs.32¾ lakhs. Approximately 60 per cent. of this trade is in the hands of Japan, whose sendings declined from 8.3 million yards, value Rs.18¾ lakhs to 5.8 million yards, value Rs.18 lakhs. The smaller share of the United Kingdom registered an appreciable advance in value, from 2.6 million yards, value Rs.10 lakhs, to 2.7 million yards, value Rs.12½ lakhs.

Fents.—The aggregate trade contracted by more than 50 per cent., from 10.2 million lbs. valued at Rs.71 lakhs to 4.9 million lbs. valued at Rs.33¾ lakhs. This reduction was suffered entirely by Japanese manufacturers, whose shipments declined from 8½ million lbs., value Rs.60¾ lakhs, to 1.6 million lbs., value Rs.13.4 lakhs. On the other hand, the arrival from the United Kingdom registered a sharp increase from 1.3 million lbs., value Rs.8½ lakhs to 2 million lbs., value Rs.12¾ lakhs. The arrivals from the United States of America also advanced from 0.4 million lbs., value Rs.1.9 lakhs to 1.2 million lbs., value Rs.7 lakhs.

Cotton Sewing Thread.—There was some contraction in this trade from 1.9 million lbs. valued at Rs.41.2 lakhs to 1½ million lbs. valued at Rs.34.4 lakhs. Approximately 80 per cent. of this trade is enjoyed by the United Kingdom, whose shipments declined somewhat from 1.3 million lbs., value Rs.32 lakhs, to 0.9 million lbs., value Rs.27 lakhs.

U.S.A.

Exports of Raw Cotton, Cotton Yarns, and Cotton Manufactures for Year ending December, 1937.

Group 2		Twelve months ending December, 1937	
		Quantity	Dollars
COTTON, UNMANUFACTURED ..	{ bales .. 1,000 lb.	6,023,695 3,223,168	} 368,659,807
Raw Cotton, except linters ..	{ bales .. 1,000 lb.	5,728,009 3,034,778	} 360,023,383
American Egyptian ..	{ bales .. 1,000 lb.	275 144	} 37,080
Other 1½ inches and over ..	{ bales .. 1,000 lb.	57,307 30,642	} 3,400,505
Upland, under 1½ inches ..	{ bales .. 1,000 lb.	5,670,427 3,003,992	} 356,585,798
Linters :			
Grades 1 to 8 inclusive ..	{ bales .. 1,000 lb.	295,686 188,390	} 8,636,424
COTTON SEMI-MANUFACTURES ..	.. .. lb.	170,590,092	16,016,755
Cotton pulp .. .. .	.. .. lb.	48,628,349	4,046,676
Cotton-mill waste (except card strips and comber waste) .. .. .	.. .. lb.	64,172,249	4,996,024
Cotton rags, except paper stock ..	.. .. lb.	24,997,346	1,421,698
Cotton batting, carded cotton, and roving	.. .. lb.	510,843	107,011
Cotton card strips and comber waste ..	.. .. lb.	24,168,762	2,277,074
Cotton yarn :			
Carded yarn, not combed .. ..	.. .. lb.	5,268,911	1,566,211
Combed yarn :			
Mercerised .. .. .	.. .. lb.	1,819,984	1,215,456
Not mercerised .. .. .	.. .. lb.	1,023,648	386,605
COTTON MANUFACTURES ..	.. ..	—	43,645,755
Cotton thread and cordage :			
Sewing thread .. .. .	.. .. lb.	1,059,158	961,412
Crochet, darning, and embroidery cotton	.. .. lb.	31,208	30,149
Twine and cordage .. .. .	.. .. lb.	3,066,516	1,043,648
Cloth, duck, and tyre fabric ..	.. .. sq. yd.	236,150,695	28,279,956
All cotton cloth when exported to Philippine Islands to be embroidered and otherwise manufactured and returned to the United States .. .. .	.. .. sq. yd.	10,541,724	1,133,042
Tyre fabric :			
Cord .. .. .	.. .. sq. yd.	4,077,143	1,117,621
Other .. .. .	.. .. sq. yd.	1,672,607	465,417
Cotton duck .. .. .	.. .. sq. yd.	7,669,412	2,067,768
Heavy filter, paper dryer, hose and belting duck .. .. .	.. .. sq. yd.	458,712	206,296
Unbleached :			
Ounce .. .. .	.. .. sq. yd.	3,640,653	685,481
Numbered .. .. .	.. .. sq. yd.	2,343,853	773,369

U.S.A. EXPORTS OF RAW COTTON, &c.—*continued*

Group 2— <i>continued</i>					Twelve months ending December, 1937	
					Quantity	Dollars
Bleached	..	..	..	..sq. yd.	404,809	120,029
Coloured	..	..	..	..sq. yd.	821,385	282,593
Cotton cloth, unbleached	..	..	..	..sq. yd.	47,158,343	3,436,994
Drills, twills, and sateens	..	..	..	..sq. yd.	4,023,868	443,064
Sheetings 40 inches wide and under	..	..	..	..sq. yd.	27,933,245	1,908,025
Sheetings over 40 inches wide	..	..	..	..sq. yd.	888,371	82,097
Osnaburgs	..	..	..	..sq. yd.	7,060,258	618,849
All other unbleached	..	..	..	..sq. yd.	7,252,801	384,959
Cotton cloth, bleached	..	..	..	..sq. yd.	43,402,985	4,659,998
Drills, twills, and sateens	..	..	..	..sq. yd.	3,830,008	666,557
Pajama checks	..	..	..	..sq. yd.	414,736	41,957
Sheetings 40 inches wide and under	..	..	..	..sq. yd.	10,492,324	949,114
Sheetings over 40 inches wide	..	..	..	..sq. yd.	6,291,364	769,804
All other bleached	..	..	..	..sq. yd.	22,374,553	2,232,666
Cotton cloth, coloured	..	..	..	..sq. yd.	121,628,481	15,399,116
Voiles	..	..	..	..sq. yd.	2,895,242	318,297
Percales and prints, 32 inches and narrower	..	..	..	..sq. yd.	370,922	43,347
Percales and prints, over 32 inches wide	..	..	..	..sq. yd.	14,244,926	1,609,813
Flannels and flannelettes	..	..	..	..sq. yd.	802,113	113,365
Khaki and fustians	..	..	..	..sq. yd.	4,078,813	880,558
Denims	..	..	..	..sq. yd.	10,279,144	1,481,420
Suitings ("drills," etc.)	..	..	..	..sq. yd.	13,285,572	2,005,643
Ginghams	..	..	..	..sq. yd.	173,583	18,504
Chambrays	..	..	..	..sq. yd.	11,025,037	1,037,926
Other printed fabrics, 7½ and more yards per pound	..	..	..	..sq. yd.	12,063,274	1,480,539
Other printed fabrics, less than 7½ yards per pound	..	..	..	..sq. yd.	15,895,293	1,903,920
Other piece-dyed fabrics, 5 and more yards per pound	..	..	..	..sq. yd.	24,004,533	2,581,820
Other piece-dyed fabrics, less than 5 yards per pound	..	..	..	..sq. yd.	7,351,736	1,043,667
Other yarn-dyed fabrics	..	..	..	..sq. yd.	3,656,114	560,544
Cotton and rayon mixtures (chief value cotton)	..	..	..	..sq. yd.	1,502,179	319,853
Other cotton fabrics:						
Blankets	..	..	..	..lb.	1,020,614	485,848
Damasks	..	..	..	..sq. yd.	290,701	66,720
Tapestries and other upholstery goods	..	..	..	..sq. yd.	579,964	234,495
Velveteens	..	..	..	..sq. yd.	36,131	27,271
Corduroys	..	..	..	..sq. yd.	8,670	4,698
Plushes	..	..	..	..sq. yd.	148,897	121,299
Other pile fabrics	..	..	..	..sq. yd.	52,987	36,205
Fabrics sold by the pound	..	..	..	..lb.	8,676,901	2,176,095
Cotton wearing apparel	..	..	..	..	—	5,338,895
Knit goods:						
Gloves	..	..	..	..doz. pr.	51,772	98,850
Hosiery	..	..	..	..doz. pr.	405,601	603,223

U.S.A. EXPORTS OF RAW COTTON, &c.—*continued*

Group 2— <i>continued</i>				Twelve months ending December, 1937	
				Quantity	Dollars
Women's	doz.	pr.		58,955	95,574
Children's	doz.	pr.		106,416	130,079
Men's socks	doz.	pr.		240,230	377,570
<hr/>					
Underwear :					
Men's and boys'	doz.			141,642	387,216
Women's and children's	doz.			51,736	135,214
Sweaters, shawls, and other knit outerwear ..	no.			243,028	136,280
Other wearing apparel :					
Cotton overalls, breeches, and pants ..	doz.			27,919	264,914
Underwear, not knit	doz.			49,860	177,604
Shirts	doz.			168,688	1,708,139
Dresses, skirts, and blouses	no.			1,511,016	1,193,250
Other cotton clothing				—	634,205
<hr/>					
Other cotton manufactures :					
Handkerchiefs	doz.			222,914	159,980
Laces, embroideries, and lace window curtains				—	161,913
Woven belting for machinery	lb.			268,056	148,027
Cotton bags	lb.			6,128,342	1,764,939
Quilts, comforts, counterpanes and bed- spreads	no.			108,148	178,351
Bed sheets, pillow, bolster, and mattress cases	doz.			20,662	123,144
Bath mats	doz.			1,828	15,848
Towels and wash cloths	doz.			175,345	379,838
Other cotton manufactures, n. e. s.				—	1,907,024

Imports of Raw Cotton, Cotton Yarns, and Cotton Manufactures
for Year ending December, 1937.

Group 2				Twelve months ending December, 1937	
				Quantity	Dollars
COTTON, UNMANUFACTURED	lb.			134,120,862	16,591,843
Staple under 1½ inches, free	lb.			81,667,212	8,529,314
Staple 1½ to 1¾ inches, dut	lb.			10,998,046	2,155,766
Staple 1¾ inches or over, dut	lb.			25,543,869	5,164,288
Cotton liners, free	lb.			15,911,735	742,476
<hr/>					
COTTON SEMI-MANUFACTURES				—	5,242,801
<hr/>					
Cotton waste, free				71,203,999	3,561,339
Yarns and warps :					
Not bleached, dyed, etc., dut	lb.			9,600	1,422
Bleached, dyed, combed, or plied, dut ..	lb.			2,009,699	1,680,040
<hr/>					
COTTON MANUFACTURES				—	51,666,876
Sewing thread, crochet, darning, and em- broidery cotton, dut	1,000 yd.			964,930	418,770
Cotton cloth :					
Not bleached, etc., dut	sq. yd.			4,282,615	848,813
Bleached, dut	sq. yd.			97,810,502	6,022,284
Printed, coloured, etc., dut	sq. yd.			45,226,709	6,757,085

U.S.A. IMPORTS OF RAW COTTON, &c.—*continued*

Group 3— <i>continued</i>				Twelve months ending December, 1937	
				Quantity	Dollars
Cotton fabrics, n.e.s. :					
Cloth less than 17 per cent. wool, dut	lb.			43,109	20,555
Tapestries and upholstery, dut	..	..		—	1,411,701
Velvets and velveteens, dut	..	..sq.	yd.	3,994,118	670,498
Other pile fabrics, dut	..	..	..	—	316,432
Table damask, dut	..	..	lb.	1,915,877	1,434,028
Table covers, napkins, etc., dut	..	..	..	—	928,045
Blankets and blanket cloth, dut	..	..	lb.	25,250	7,599
Bedspreads and quilts, dut	..	..	no.	2,795,688	1,888,885
Sheets, cases, towels, etc., dut	..	..	..	—	596,281
Wearing apparel :					
Knit or crocheted goods :					
Gloves and mittens, dut	..	doz.	pr.	2,237,010	4,213,405
Hosiery, dut	..	..	doz. pr.	1,649,146	816,205
Underwear and other, dut	..	..	..	—	265,969
Wearing apparel, not knit, dut..	..	..	..	—	725,630
Apparel wholly or partly of lace, or embroidered, etc., dut..					
From Philippine Islands, free	..	..	..	—	4,318,304
Handkerchiefs :					
Not embroidered, nor of lace, dut	..	doz.		3,251,196	667,202
Embroidered, etc. dut	..	..	no.	300,922	27,649
Laces, embroideries, etc. :					
Hand-made laces, lace fabrics, and lace articles over 2 inches wide, valued over \$50 per pound, dut	..	..	lb.	173	18,569
Hand-made laces, n.e.s., dut..	..	..	..	—	300,390
Machine-made laces, dut	..	..	..	—	3,112,854
Lace articles, etc., dut	..	..	..	—	373,620
Lace window curtains, dut	..	..	..	—	829,856
Embroideries, dut	..	..	..	—	26,251
Other articles, trimming, etc., dut	..	..	..	—	1,741,377
From Philippine Islands, free	..	..	..	—	174,477
Cotton floor coverings, dut	..	..sq.	yd.	17,143,451	5,580,004
Belts and rope used as belting, dut	..	..	lb.	306,812	141,917
Rags, except paper stock, dut	..	..	lb.	30,100,947	1,762,057
All other, dut	..	..	..	—	4,940,664

IMPORTS OF FOREIGN COTTON INTO U.S.A.

AUG. 1, 1937 TO JAN. 31, 1938, WITH COMPARISONS

		(500-pound bales)							Per cent. this year is of 5-year average
Country of production		1913-14	1933-34	1934-35	1935-36	1936-37	1937-38	5-year average 1933-37	
Egypt	..	37,305	44,287	41,022	29,374	32,291	25,308	36,321	69.7
Peru	..	7,033	2,885	682	505	526	610	1,506	40.5
China	..	2,853	8,949	2,235	9,335	10,949	4,070	10,370	39.2
Mexico	..	13,267	1,262	1,018	90	8,799	2,171	2,234	97.2
India	..	2,766	10,166	11,256	16,034	17,472	12,674	11,165	113.5
Other countries	..	299	362	170	691	1,602	1,613	648	248.9
Total	..	63,523	67,011	56,383	56,029	71,610	46,446	62,244	74.6

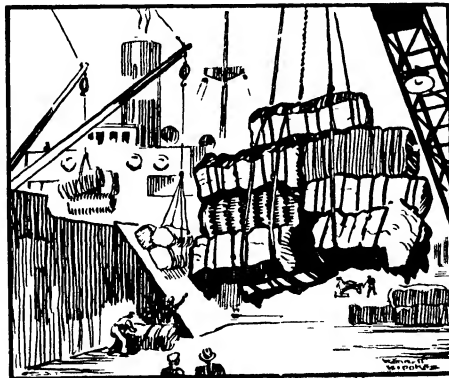
(Crops and Markets)

JAPANESE PRODUCTION OF COTTON YARN AND PIECEGOODS

Year and Month	Cotton Yarn†	Cotton textile*		Silk-Cotton Mixed Textiles*		Cotton† Piece-goods 1,000 sq. yds.	Muslin*
		Broad Width	Narrow Width	Broad Width	Narrow Width		
	bale	meter	piece	meter	piece		meter
1935 ..	3,500,837	3,811,718,463	113,034,685	4,278,844	1,866,844	1,843,469	107,779,419
1936 ..	3,007,463	3,618,936,769	112,454,991	4,271,345	2,487,015	1,802,101	81,324,916
1936 Oct. ..	298,387	304,429,887	8,686,965	368,024	292,632	145,129	6,230,351
Nov. ..	318,427	319,943,087	8,321,876	373,752	281,917	151,601	4,518,545
Dec. ..	326,639	317,274,426	8,817,939	435,132	299,539	157,739	5,216,275
1937 Jan. ..	326,126	296,595,348	8,870,165	435,001	224,286	154,163	4,344,196
Feb. ..	329,822	293,290,597	7,953,186	410,285	162,146	159,447	3,354,796
Mar. ..	325,890	301,808,430	9,783,624	445,478	224,784	157,384	2,924,648
April ..	337,804	314,111,013	10,002,400	365,709	219,420	160,543	2,989,454
May ..	334,942	324,792,349	10,037,942	366,836	160,043	160,233	2,986,408
June ..	341,461	327,818,710	9,131,866	457,504	116,811	160,806	3,159,739
July ..	338,387	325,317,292	8,364,271	508,220	160,135	157,441	3,219,234
Aug. ..	339,796	316,405,902	7,135,889	243,029	84,695	156,247	3,097,939
Sept. ..	349,846	318,141,909	8,463,630	369,571	293,552	159,416	3,493,786
Oct. ..	336,900	335,373,461	9,242,055	438,144	217,115	159,536	3,403,331
Jan. to Oct. {	1937.. 3,300,074	3,157,133,911	88,986,661	3,939,777	1,802,987	1,585,516	32,973,531
Oct. {	1936.. 2,962,377	2,981,718,256	95,315,176	3,462,161	1,905,529	1,490,061	83,909,063

Source : *Department of Commerce and Industry, Tokyo.

†Japan Cotton Spinners' Association.



MISCELLANEOUS

COCOA AND COTTON

A memorandum issued recently by the Economic Service of the Joint Committee of Cotton Trade Organisations drew attention to the West African cocoa dispute and its influence upon Lancashire's exports of cotton goods. It was pointed out that the high standard of living in the Gold Coast, which enables it to impart a greater volume of cotton goods per head of population than most African countries, is largely dependent upon the exports of cocoa.

The London price of Accra cocoa rose in the general commodity boom during 1936 and the first half of 1937, and was hardened still further by fears of a shortage due to underestimate of the crop. During 1937, however, consumption in the United Kingdom declined by 7 per cent., and in the United States by between 15 and 25 per cent., furthermore the Gold Coast supplies were larger than expected, consequently the price dropped from 60s. od. in January, 1937, to 23s. 6d. at the end of the year.

In October the leading manufacturers and shippers represented on the Gold Coast formed a buying association with the objective of preventing abuses which enabled native chiefs to obtain a higher price than that ruling in the market. As a protest against this association, a large number of cocoa farmers on the Gold Coast resolved to sell no more cocoa until the association was dissolved, a scheme which later received the support of the Ashanti chiefs. It was decided to continue the hold-up until April, and if by that time the buyer's agreement had not been cancelled, to burn the remainder of the crop.

A native boycott of foreign merchandise was imposed soon after the cocoa suspension, and this has had serious effects on the imports of British and other cotton goods.

Some decline in imports of cotton goods into West Africa from the very high levels reached in 1936 and early in 1938 was inevitable when cocoa prices broke, but the decline has been much accentuated by the cocoa dispute. Thus exports of cotton piecegoods from the United Kingdom were only 9.0 million square yards in December, 1937, and 5.1 million in January, 1938, and 2.9 million in February, against 20.6, 18.0 and 16.1 million in the corresponding months of 1936 and 1937.



NATIONAL COTTON WEEK IN U.S.A.

National Cotton Week in the United States will take place during the week May 30-June 4, and, as in other years, will be sponsored by the Cotton-Textile Institute of New York. It is felt that this theme particu-

larly suits the economic and social conditions of the times. Cotton not only supports the nation's largest factory industry but from the farm up to the point of distribution of cotton goods in the primary market, it provides the livelihood for practically one out of every ten persons in the country.

A new impetus has been given to Cotton Week's observance this year from the recent organisation in Atlanta of the Cotton Consumption Council. This group is made up of official representatives of the cotton-growing states and of the cotton farmers and also of representatives of the cotton manufacturers and of the principal chain store groups. The stated purpose of the Council is to increase the domestic consumption of cotton and thus cut into the present crop surplus overhanging the market. It takes as its first immediate objective the doubling this year of the 1937 Cotton Week sales of cotton goods.

The Cotton Consumption Council embraces 8,500 dry goods, notion and variety stores affiliated with the Institute of Distribution and which sold 600 million dollars worth of cottons last year; 37,000 food chain stores whose operations are an important factor in the yearly consumption of 500 million square yards of cottons used for grocery item bags; and also the great national drug and shoe chains which together last year had an estimated sales volume in cotton products of more than 75 million dollars. For the first time in history these leading chain stores have united their merchandising forces behind cotton goods, and it is expected that their recognition of National Cotton Week as a great selling opportunity will be shared by all retailers.

In connection with the Cotton-Textile Institute's promotion of National Cotton Week, merchants will be provided with an Idea Book offering an abundance of tested suggestions for co-ordinating the buying, merchandising and advertising of cottons. Distribution will be made next month of the official full-size poster in red, white and blue colour scheme. The Institute's promotional plans will also include, among other activities, a comprehensive information service for the guidance and assistance of all retail store participants in Cotton Week.

A COTTON EXCHANGE FOR POLAND

The Monthly Review of the National Economic Bank, Warsaw, refers to the probability of the establishment of a cotton exchange at the port of Gdynia in Poland. It is pointed out that the cotton stores, which lie within the free Customs zone, have been leased by the National Economic Bank, which runs them as a commercial enterprise and has the right to issue warrants. The concentrating in the port of Gdynia of almost the whole Polish import of cotton, necessitated the organisation of the trade in this commodity. In 1934 there was formed the Organisation Committee for the Cotton Trade, and shortly afterwards, the Association of Cotton Traders, which has organised cotton arbitration in Gdynia. These organisations have been prolonged until this year, as it is now

expected to bring into operation the Gdynia Cotton Exchange, which will have its own building. It is stated that the opening of this cotton exchange at Gdynia will undoubtedly contribute to the increase of cotton re-exports to neighbouring countries.

COTTON IN ROAD CONSTRUCTION

The following is taken from a recent issue of the *Manufacturers' Record*, of Baltimore, U.S.A. :—

Though cotton has been used as an aid or agent in road construction for upwards of fifteen years, it is only within the past year or so that it has attracted particular attention ; and now its use is extended to 35 states for lining of ditches and use in highway and airport runway construction. This expanded use has been due to new legislation which permits expenditure by the Secretary of Agriculture for experimentation in new and improved uses for cotton.

As far as cotton in road construction is concerned, two methods have been employed. One, involving cotton mats for curing the concrete ; and two, utilisation of cotton fabric as a reinforcing agent in bituminous surfaced roads. In both cases, this cotton has been made available to state highway departments with the only provisos being their use in an approved manner and the recording of the performance for future evaluation.

So far three types of fabric have been used, varying in weight from 3.2 oz. to 5.3 oz. per square yard, and at a cost ranging from \$168.96 to \$295.68 per mile of road 18 ft. wide, figuring cotton at 8 cents per lb. and allowing no cost for manufacture of the fabric. To date, a total of 6,166,786 square yards have been supplied to states for reinforcing 578.23 miles, the largest user being Alabama with 1,260,094 sq. yds. and North Carolina a close second with 1,115,253 sq. yds.

It is estimated that by bulk purchase of cotton mats for curing concrete roads, the cost may be reduced to as low as \$5 each, so that since these can be used as many as one hundred times, the cost would probably not exceed about 4 cents per cubic yard of concrete cured. The number of these mats that have been supplied to states totals 89,535, of which about 40 per cent. of the 25,400 for New York were only half the usual size of 22 ft. 6 in. long by 6 ft. 3 in. wide.

These mats as now employed serve several purposes. They can be used to prevent freezing of the ground prior to pouring the concrete, while the advantages from laying the mats directly on the fresh concrete are many. Due to their ability to retain moisture it has been found that usually one soaking per day is sufficient—an economical fact as regards labour and water, particularly in an area where water costs are high. Results of experiments indicate that concrete cured by the use of these mats has a high compressive strength.

The experiments thus far made are reported to be superior to bituminous surfaced roads without the reinforcement, and that in at least one

case where, after nine years, the road was re-opened, the cotton was found in an almost perfect state of preservation. Not only are these cotton roads an improvement in performance but they also offer a decided saving in maintenance costs.

WORLD OUTPUT OF TEXTILE FIBRES

We extract the following from the speech of Mr. Samuel Courtauld at the annual meeting of Courtaulds Ltd., held recently.

The estimated world production of rayon yarn in 1937 was about 1,200,000,000 lbs., an increase of 16 per cent. over 1936. Staple fibre production was about 610,000,000 lbs., an increase of 105 per cent.

Production by countries was as follows :—

RAYON YARN					
		lbs.			lbs.
Japan	341,000,000	Canada	16,500,000		
U.S.A.	312,000,000	Belgium	16,500,000		
Germany	130,000,000	Poland	13,800,000		
United Kingdom ..	120,000,000	Russia	13,700,000		
Italy	106,000,000	Switzerland ..	12,100,000		
France	66,000,000	All others	22,165,000		
Holland	23,700,000				

STAPLE FIBRE					
		lbs.			lbs.
Germany	210,000,000	United Kingdom ..	33,000,000		
Japan	175,000,000	U.S.A.	20,000,000		
Italy	154,325,000	All others	19,530,000		

The following are the 1937 percentages of the world production of all textile fibres, totalling 29,447,000,000 lbs. in weight :—

	Per cent.		Per cent.
Cotton	62.5	Flax	5.3
Wool	7.7	Rayon yarn	4.0
Jute	11.7	Staple fibre	2.1
Hemp	6.3	Silk	0.3

Wool is taken at its clean weight ; if the greasy weight was taken the percentage would be 12.6.

UNITED STATES FIBRE CONSUMPTION

According to *Rayon Organon*, the total value of textile fibres consumed in the United States last year was \$1,084,600,000—the highest value reached since 1929, and \$5,000,000 above the figure for 1936, the record for the recovery years. The value of raw cotton consumed in 1937, \$417,500,000, was slightly lower than the figure for 1936, \$419,900,000, although the quantity of cotton consumed in 1937 established a new record ; the lower average price of 11.5c. per pound prevailing last year was the reason for the decline in value.

THE DAVISON PUBLISHING COMPANY

The Davison Publishing Company, of 50 Union Square, New York, recently decided to move its entire organisation to 201 East Ridgewood Avenue, Ridgewood, New Jersey. The Davison Publishing Company are the publishers of the well-known Davison's Textile Blue Book, the cotton trade directory of North America, and many other textile trade publications.

Reviews on Current Cotton Literature

"KARACHI COTTON ANNUAL, 1936-37, No. 4." A compendium of all matters relating to the Karachi Cotton Trade with particular reference to Sind, the Punjab, United Provinces and Rajputana. The book also contains statistical tables and charts of crops, exports, prices, stocks, consumption, Government notifications, etc. Compiled and published by T. B. Dalal, B.A., F.S.S., F.R.E.S., Secretary, Karachi Cotton Association Ltd., Karachi. Price Rs. 2.

"ANNUARIO DELL'INDUSTRIA COTONIERA ITALIANA, 1937—XV." We have received the above publication, which is a directory of the Italian cotton industry. In the first instance, this publication gives, in alphabetical order, a list of all the cotton spinning, doubling, weaving and finishing firms in Italy, where full particulars as to their various products, manufactured by each firm, are given. The capital, names of directors, countries to which they export and the width of the looms are also given. Other lists have been compiled, alphabetically by the names of the towns, and included in the book.

Another list gives the actual counts spun and doubled in the different varieties of cotton used.

The weaving section is covered by an alphabetical list of types of cloth, with the firms producing the same. At the end of the book is another alphabetical list of directors and the firms with which they are connected.

This is one of the best directories we have seen and contains 557 pages, and should prove invaluable to buyers of cotton yarns and cloth and of textile machinery, exporters of cotton, etc.

It is suggested by the reviewer that in the next issue, the number of spindles owned by each mill should be included; in many cases the number of looms is given.

"LA PRODUCCION DE ALGODON EN LA REPUBLICA ARGENTINA Y EN OTROS PAISES." (Second edition) published by the Argentine Ministry of Agriculture, Junta Nacional del Algodon, Buenos Aires.

A useful publication to those interested in the development of cotton cultivation in the Argentine. This is really a reprint of a previous edition with all the tabulations and graphs brought up-to-date.

"LA COSECHA MECANICA DEL ALGODON." Rafael Garcia Mala and Romulo A. Frauchelli of the Junta Nacional del Algodon, Buenos Aires.

This publication deals, as the title implies, with the question of mechanical cotton picking and is the result of an investigation into the capabilities of the Rust Cotton Picker.

The Argentine is very interested in the perfection of a mechanical cotton picker in view of the fact that the labour problem in the cotton zones during the picking seasons is very acute. Being recently settled regions, there is never sufficient labour for cotton picking, and this is perhaps the chief point at present in limiting the size of the Argentine cotton crop.

The machine was subjected to very methodical tests and it was found that in the first passage of the machine over the field, 58.1 per cent. of the open cotton was picked, and in the second passage of the machine 14.8 per cent. was gathered, leaving 12.2 per cent. on the plant and 14.9 per cent. on the ground. It should be remembered that the plants were ordinary Upland types with heavy branches and not plants developed specially for the mechanical picker. When a suitable branchless variety has been developed a higher percentage will be picked and less cotton damaged by being knocked on to the ground.

In passing over the field the machine damaged 14.8 per cent. of the plants. The machine travels at 4.3 kilometres per hour and covered in each picking .300 to .343 hectares per hour, and to completely pick a hectare in two pickings will take from 10 to 17½ hours.

The cost of picking is estimated to be 1.17 Argentine pesos per 10 kilos of seed cotton, and it is possible, by the use of this machine, to reduce the cost of picking from 30 to 60 per cent. as compared with hand picking.

We are very pleased to receive from the firm of Val. Mehler A.G., Fulda, Germany, the book they have published to celebrate the centenary of the firm. It takes the form of a pictorial description of the work of the firm, through the various processes of weaving, dyeing, waterproofing, finishing and making up of garments. Both the descriptive and the illustrative portions of the book are the work of experts, and the firm is to be warmly congratulated upon the production of so worthy a testimonial to the progress it has made during the one hundred years of its existence.

"THE EMPIRE COTTON GROWING REVIEW." Published quarterly by Messrs. P. S. King & Son Ltd., 14 Gt. Smith Street, London, S.W.1, for the Empire Cotton Growing Corporation. Annual subscription: 5s. post free. Many articles of interest are contained in the April 1938 issue of the Review. The following are some outstanding features:—

- "The Indian Central Cotton Committee and its Work"—by Sir Bryce Burt and D. N. Mahta.
 "Finance, America and Cotton Prices"—by J. A. Todd.
 "A Note on the Technique of Cotton Breeding"—by T. G. Mason.

"THE WORLD TEXTILE INDUSTRY. ECONOMIC AND SOCIAL PROBLEMS." Volumes 1 and 2. Published in the United Kingdom for the International Labour Office (League of Nations) by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1. Price 8s. per volume.

This Report was originally prepared and distributed in proof as a "White" Report, intended to serve as a basis for discussion at the Tripartite Technical Conference on the Textile Industry which was held in Washington, D.C., in April 1937. The Report is now reprinted with certain alterations and with the addition of certain documents relating to the Textile Conference, including the texts of the conclusions adopted by it. Volume 1 contains fourteen chapters under such headings as The Scope and Character of the Textile Industry, Sources of Raw Materials, World Textile Manufacturing (containing details of Mill Consumption of Raw Cotton, and particulars of plant and equipment, spinning and weaving, and volume of output by countries), World Trade in Textiles, Changing Patterns of Textile Production and Trade (dealing with changes in productive capacity in India, Japan and the United Kingdom and also with the New Textile Countries such as China and Brazil). Other subjects treated are the Problems of Overproduction and Underconsumption, Factors in International Competition, The Composition of Labour, Wages Rates and Earnings, and Hours of Work. Volume 2 contains the relevant statistical tables and also includes a record of the Proceedings of the Washington Conference.

"THE LANCASHIRE TEXTILE INDUSTRY." Fifty-fourth Annual Edition. Published by John Worrall Ltd., Oldham, Lancs. Price, Desk Edition, 15s. Pocket Edition (for travellers and salesmen), 12s. 6d.

The fifty-fourth edition of this most valuable directory of the Lancashire Textile Industry has recently made its appearance. It is specially compiled for the use of Spinners, Manufacturers, Merchants, Shippers, Agents and all who cater to the requirements of the Textile and Allied trades. It includes a list of upwards of 2,000 mills in 330 districts of Lancashire, giving titles, equipment (spindles and looms), counts spun, and class of goods manufactured, etc. The Summary of the Approximate Numbers of Spindles and Looms, and the Tabular Statistics showing increases and decreases thereof are most valuable sections of the Directory. An Abstract of Summaries from 1882 to date provides information of the yearly progress or otherwise in the Industry.

The Alphabetical List of Managers, Secretaries and Salesmen gives the names of approximately 2,700 executives. The Standard List of Cotton Fabrics embraces over 200 different classifications, complementary to which is a Classified Yarn Section showing the principal source of supply for various types of yarn.

BOOKS RECEIVED

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN BRAZIL, OCTOBER 1937." By the Commercial Counsellor and the Commercial Secretary to H.M. Embassy at Rio de Janeiro. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 3s. net.

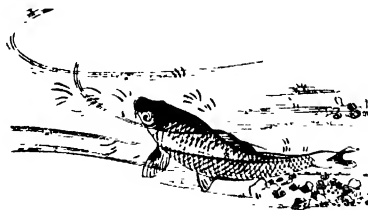
"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN PERU, OCTOBER 1937." By Mr. A. H. Marlow, Commercial Secretary, Lima. Printed and published for the Department of Overseas Trade, by H.M. Stationery Office, London. Price 9d. net.

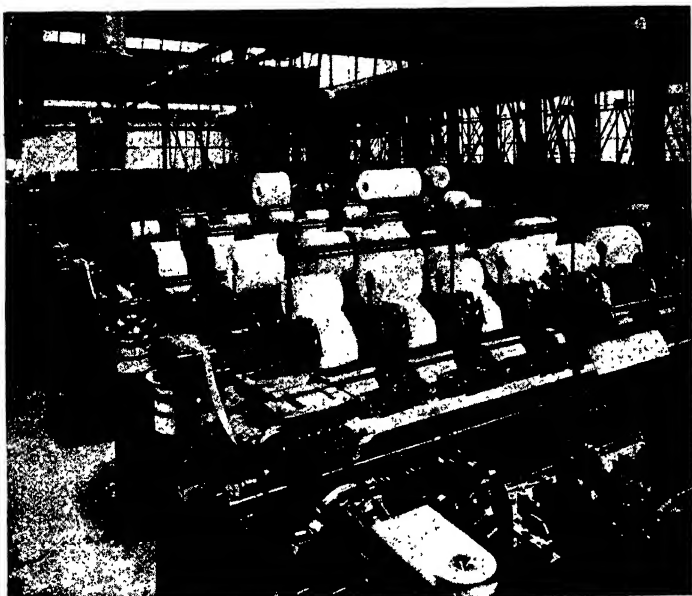
"WORLD CONSUMPTION OF WOOL, 1937." A supplement to Wool Intelligence Notes, prepared in the Intelligence Branch of the Imperial Economic Committee. Printed and published for the Imperial Economic Committee by H.M. Stationery Office. Price 2s. 6d. net. 2s. 11d. post free.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN AUSTRIA, DECEMBER, 1937." By The Commercial Counsellor to H.M. Legation in Vienna. Printed and Published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 1s. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN DENMARK, DECEMBER, 1937." By The Commercial Secretary to H.M. Legation at Copenhagen. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 1s. 6d. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN AUSTRALIA, NOVEMBER 1937." By H.M. Senior Trade Commissioner in the Commonwealth of Australia. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 2s. 6d. net.





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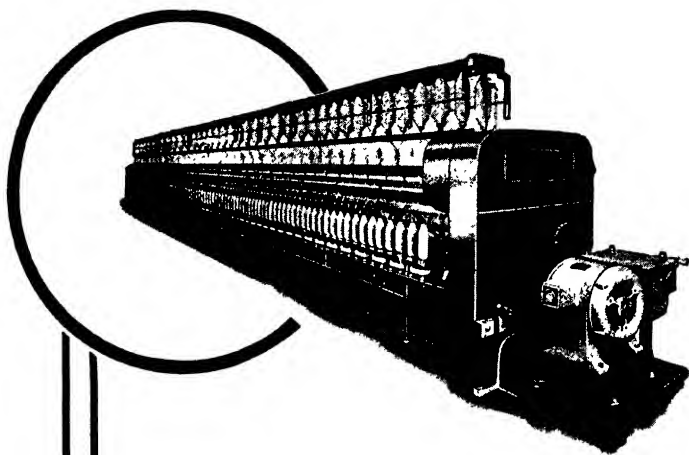
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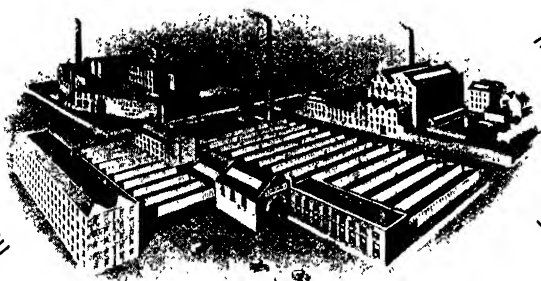
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COMMITTEE'S COMMUNICATIONS

MEETING OF THE JOINT EGYPTIAN COTTON COMMITTEE, BERLIN, JULY 29, 1938

At the meeting of the Joint Egyptian Cotton Committee held in Berlin on July 29, the Committee discussed the question of the Humidity Agreement for Egyptian Cotton and, as is well known to members, it had been decided at the Cairo Congress that the existing Humidity Agreement should remain in force until fourteen days after this Berlin meeting.

The attention of members is drawn to the resolution adopted by the Committee. The exporters submitted a resolution substantially based on the Sils-Maria resolution of 1936, but in the meantime, a month ago, the spinners put forward a demand that all cotton exported from Egypt should be sold on the basis of dry weight plus $8\frac{1}{2}$ per cent. regain, Alexandria weights and tests as ascertained and certified by the Alexandria Testing House. The Egyptian exporters, however, not having plenary powers to accept this proposition, declared that they were unable to take a decision upon the matter without referring it back to their Association.

The following resolution was eventually adopted unanimously :—

The members of the Joint Egyptian Cotton Committee at their meeting in Berlin after due consideration of—

(a) the proposition submitted by the spinner members, suggesting that all cotton exported from Egypt should be sold on the basis of dry weight plus $8\frac{1}{2}$ per cent. regain, weights and tests as certified by the Alexandria Testing House to be accepted for the next two years, and of

(b) the proposition submitted by the Egyptian members which was substantially based upon the spinners' Sils-Maria resolution.

Resolved that, in order to give the Alexandria exporters further time to consider the latest proposal made by the spinners so that the former might communicate their decision to the spinners before September 30 next, the present Humidity Agreement should be extended until fourteen days after the termination of the meeting of the International Cotton Committee to be held in Venice on September 30 and October 1, 1938—that is October 15, 1938.

M. ARTHUR WADDINGTON

Nous apprenons avec un profond regret que M. Arthur Waddington vient d'abandonner, pour raisons de santé, la Présidence du Syndicat General de l'Industrie Cotonnière Française.

Tous ceux qui ont eu l'occasion de rencontrer M. Waddington ont particulièrement apprécié, en même temps que sa grande expérience des choses de notre industrie, l'intérêt si sympathique qu'il portait aux travaux de la Federation et la haute courtoisie de l'accueil qu'il réservait toujours aux Membres du Comité International lors de leurs réunions à Paris.

M. Waddington a été remplacé à la Présidence du Syndicat par une personnalité du premier plan de l'Industrie Cotonnière Française de l'Est, M. Victor Tenthorey, à qui nous adressons nos plus sincères félicitations.

It is with sincere regret that we learn of the resignation of Mr. Arthur Waddington from the Presidency of the French Association of Master Cotton Spinners and Manufacturers. Reasons of health have compelled Mr. Waddington to take this step.

All those who have come into contact with Mr. Waddington could not fail to appreciate the wide knowledge he possesses of all subjects appertaining to the cotton industry, as well as the keen interest he has always evinced in matters relating to the work of the International Cotton Federation and the warmth of the welcome he always gave to members of the International Cotton Committee whenever they met in Paris. We extend to him our best wishes for his future happiness, together with the hope that his health will steadily improve.

Mr. Waddington has been succeeded as President of the French Association by one of the outstanding personalities of the Eastern French Cotton Employers' Association, namely, Mr. Victor Tenthorey, to whom we express our sincerest wishes for a successful term of office.



BELGIUM

The crisis, which we have already indicated in our previous reports, continues to paralyse the Belgian Cotton Industry.

The Belgian Master Cotton Spinners' Association has maintained the general short-time measures : the spinners are working one or two days short time per week. For the months of April, May and June, 1938, the production per spindle installed shows a reduction of 21 per cent. as compared with the production of the same months in 1937.

Short time is maintaining the stock of yarns at Belgian mills at the same level as reached at the beginning of the year. It is, however, insufficient to permit of the disposal of the excess of stock which has been accumulating since the end of 1937. These considerations show the insufficiency of mill takings. During the last few months spinners have received very few orders, except at the time of the devaluation of the French franc when the weavers obtained contracts, which appear to be of a speculative nature. Wages have remained unchanged during the period under review.

The original report in French follows :—

La crise dont nous avons indiqué le développement dans nos rapports précédents, continue à paralyser l'industrie cotonnière belge.

L'Association Belge des Filateurs de Coton a maintenu les mesures de chômage collectif : les filatures chôment soit un jour, soit deux jours par semaine.

Pour les mois d'avril, mai et juin 1938, la production par broche installée marque un recul de 21% par rapport à la production des mêmes mois de 1937.

Ce chômage permet de maintenir le stock de filés de la filature belge au niveau atteint au début de l'année : il est encore insuffisant pour résorber l'excédent de stock qui s'était formé dès la fin de 1937.

Ces considérations font ressortir l'insuffisance des prises de livraisons.

Au cours des derniers mois les filateurs ont inscrit très peu d'ordres, sauf au moment de la dévaluation du franc français où des tisseurs ont signé des contrats qui paraissent être de nature spéculative.

Les salaires sont restés inchangés.

(Association Belge des Filateurs de Coton)

BRAZIL.

Generally speaking, orders received by the Brazilian textile manufacturing industry have been scarce during recent weeks, due largely to

the decline in business in the Interior, the fall in prices of commodities—especially of coffee and cotton—having curtailed the purchasing power of farmers and others engaged in agricultural pursuits. On the other hand, the majority of mills had large orders on hand, and many continue to work overtime in order to fill these orders. Whilst, therefore, it might superficially appear that the mills are not suffering from the trade recession, the fact is that, when orders received prior to June are worked off, many mills will be working short-time. Furthermore, some mills, believing that the recession is of a temporary nature, and having cleared off orders, have been producing for stock, with the result that, as customers are beginning to adopt a hand-to-mouth policy, stocks have accumulated in some cases.

The conditions outlined above are not peculiar to any one district, but would seem to be fairly general throughout Brazil. It is probable, however, that mills in Northern Brazil are carrying proportionately larger stocks than those in Sao Paulo and in Rio de Janeiro.

(Bank of London and South America)

CANADA.

Raw cotton consumption by Canadian mills during May was little changed as compared with the preceding month, but it was considerably below the level of the corresponding period a year previously, according to figures just released. Consumption on the basis of "equivalent 500 lb. gross bales" was 18,860 for May, as against 18,913 in April, and 24,966 a year previously. The index for May stood at 108.6, while for April it was 104.9, and for May last year it stood at 143.7. For the first five months of this year the consumption amounted to 92,844 bales, as compared with 120,330 in the corresponding period of 1937. Following are comparative figures for the five months to May 31:—

				500 lb. gross bales		Index	
				1938	1937	1938	1937
January	..	..	..	18,437	21,201	..	117.6
February	..	..	..	16,649	22,441	..	102.6
March	..	..	..	19,985	25,956	..	128.7
April	..	..	..	18,913	25,966	..	104.9
May	..	..	..	18,860	24,966	..	108.6
							143.7

(Manchester Guardian)

ENGLAND

SPINNING SECTION.

The position in the spinning branch during the past quarter was an anxious one for all concerned. Generally speaking, in that period the off-take of production in both the American and Egyptian sections suffered a further setback. This was reflected in the activity of the mills, not more than 60% capacity obtaining in the combined sections.

The value of the Yarn Price Maintenance Agreements in operation is being strikingly demonstrated under existing conditions. The Factories Act 1937, which will involve a substantial outlay on the part of the trade, came into force on July 1.

MANUFACTURING SECTION.

The Manufacturing Section has, during the last quarter, experienced a depression which has probably been more acute than any ever previously suffered. Stagnation in demand has been evident in all categories of cloths, and the export figures have fallen to an alarming extent. Stocks which accumulated during the earlier part of the year are being liquidated very slowly in view of the restricted outlet. As a natural corollary of the absence of demand, prices are most unsatisfactory and many manufacturers have been compelled to close their mills until some improvement is shown.

The activity in the manufacturing section is at present not more than 50% of capacity, and there appears to be no immediate likelihood of substantial recovery.

FRANCE

There has been no improvement in the situation of the French cotton industry during the second quarter of 1938 and business continues to be very unsatisfactory.

The movement for organised short-time, reported in the last issue of the *International Cotton Bulletin*, continues to be applied under the same conditions (10 to 20 per cent. of the legal French working hours according to districts).

The percentage of activity in the mills, taking into account short-time and machinery completely stopped, amounted at the end of May—the last month for which we have statistics available—to 71 per cent. for the spinning section and 76 per cent. for the weaving section.

At the end of the quarter under review increases in wages varying between 5 and 7 per cent. were granted in Alsace, in the region of Belfort and in the region of Roanne.

The figures for imports and exports are given at the end of the following original report in French.

The following is the original report in French :—

Aucune amélioration de la situation de l'Industrie Cotonnière Française ne s'est produite au cours du second trimestre 1938 et les affaires continuent à être dans le marasme.

Le mouvement de short-time généralisé signalé dans le dernier Bulletin continue à être appliqué dans les mêmes conditions (10 à 20% suivant les régions, par rapport à la durée légale du travail en France).

Le pourcentage d'activité des usines, compte-tenu du short-time pratiqué et de l'outillage complètement arrêté, ressortait à fin mai-dernier mois dont les statistiques sont connues : à 71% pour la filature et à 76% pour le tissage.

Au cours du trimestre en revue, des augmentations de salaires variant de 5 à 7% ont eu lieu en Alsace, dans la région de Belfort et dans le centre de Roanne.

(*Syndicat Général de l'Industrie Cotonnière Française*)

IMPORTATIONS ET EXPORTATIONS
IMPORTS AND EXPORTS

		Premier trimestre <i>First quarter</i>	
		1937	1938
		Quintaux Métriques (<i>In metric quintals</i>)	
A—Importations : (<i>Imports</i>)			
1.	Fils de coton (<i>Cotton Yarn</i>)	3,693	1,478
2.	Tissus de coton (<i>Cotton Cloth</i>)	4,082	2,631
B—Exportations : (<i>Exports</i>)			
1.	Fils de coton : Exportations totales .. (<i>Cotton Yarns—Total Exports</i>)	15,726	21,423
Destinations : (<i>Countries of Destination</i>)			
	Algérie, Colonies et Pays de Protectorat .. (<i>Algeria, Colonies and Protectorates</i>)	5,523	7,285
	Marchés étrangers (<i>Foreign Markets</i>)	10,203	14,138
2.	Tissus de coton : Exportations totales .. (<i>Cotton Cloth—Total Exports</i>)	101,535	
Destinations : (<i>Countries of Destination</i>)			
	Algérie, Colonies et Pays de Protectorat .. (<i>Algeria, Colonies and Protectorates</i>)	92,912	96,006
	Marchés étrangers (<i>Foreign Markets</i>)	8,623	9,283

GERMANY

SPINNING SECTION

The position of the German cotton spinning section during the second quarter of 1938 shows no important alteration as compared with our previous report.

New orders and the off-take on running contracts remain satisfactory as heretofore. The degree of occupation of the cotton spinning mills has therefore remained approximately the same as in the first quarter of this year.

The following report in German follows :—

In der geschäftlichen Lage der deutschen Baumwollspinnereien ist auch im 2. Vierteljahr 1938 keine bemerkenswerte Änderung gegenüber dem letzten Bericht zu verzeichnen gewesen. Der Neueingang an Aufträgen und die Abnahme auf laufende Kontrakte blieben weiterhin befriedigend. Der Beschäftigungsgrad der Betriebe konnte daher auch im 2. Vierteljahr durchweg auf dem bisherigen Stand gehalten werden.
(*Fachgruppe Baumwollspinnerei*)

WEAVING SECTION.

During the second quarter of 1938 the receipt of orders has somewhat increased over those received during the first quarter. The delivery against running contracts has remained at approximately the same level.

The average degree of occupation for the weaving mills during the second quarter was somewhat less than in the first quarter. This,

The original report in German follows :—

Der gesamte Beschäftigungsgrad der Webstühle war im 2. Vierteljahr etwas geringer als im 1. Vierteljahr. Dies ist lediglich auf eine grössere Anzahl von Feiertagen und auf die Arbeiterferien bei einem Teil der Betriebe zurückzuführen.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der
Fachgruppe Baumwollweberei)

COTTON SPINNING SECTION

COTTON WEAVING SECTION.

The demand for the home-trade during the spring season has been smaller than most manufacturers hoped and expected. Also for export the demand is much smaller than last year. For the Netherlands-Indies there are very many fewer quotas to be filled, and for most other markets the demand is also unsatisfactory. On the whole there are less looms running than a year ago and there does not seem much chance of a considerable improvement in the near future.

There has been no alteration in the wages paid in the cotton industry during this year.

The following are index numbers representing activity in the Italian cotton industry during recent years. The year 1928 is taken as the basic year, *i.e.*, 100 :—

[illegible]

During the second quarter of 1938 activity in the Italian cotton industry has been satisfactorily maintained in spite of some slight signs of depression due to a falling off in the demand in the home market and also in certain foreign markets.

There has been no reduction in the number of workpeople in employment.

Exports of cotton manufactures, up to the end of May, were £443 millions sterling as against £442 millions for the same period of 1937.

The original Italian report is appended :

Durante il 2° trimestre 1938 l'attività dell'industria cotoniera italiana ha continuato con ritmo soddisfacente, malgrado qualche lieve sintomo di depressione causato dal rallentamento delle richieste sul mercato interno e anche su taluni mercati esteri.

L'occupazione operaia non è diminuita.

Le vendite all'estero di manufatti di cotone risultavano, a fine maggio, di £443 milioni contro 442 milioni dello stesso periodo 1937.

(Federazione Nazionale Fascista Degli Industriali Cotonieri)

JAPAN.

Textile industry advices from Japan continue unfavourable. Forwardings of cotton to the mills of that country during the ten months of the present season to the end of May amounted to 771,000 bales American compared with 1,174,000 bales in the corresponding period last season, and of other growths 1,474,000 bales, compared with 2,247,000, making the total of all kinds 2,245,000 bales compared with 3,421,000 bales.

According to Osaka reports the Japanese Government in order to help to balance the international payments of the country will require spinners to use relatively more Indian, Chinese and Brazilian cotton and relatively less American.

Exports of raw cotton from the United States of America to Japan since August 1, 1937, to June 24, 1938, totalled 641,000 bales, compared with 1,536,000 bales for the same period last season.

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS:

	Aver.		
27th Dec., 1937—23rd Jan., 1938	47.32 hrs.	98.58%	of full time prod. (48 hrs.)
24th Jan., 1938—20th Feb., 1938	59.67 "	124.31%	" " "
21st Feb., 1938—20th Mar., 1938	64.79 "	134.97%	" " "
21st Mar., 1938—17th April, 1938	55.91 "	116.47%	" " "
18th April, 1938—15th May, 1938	50.44 "	105.08%	" " "
16th May, 1938—12th June, 1938	47.03 "	97.97%	" " "

EXPORTS :

				Piecegoods		Clothing
				value zl.	weight kg.	weight kg.
January, 1938	..	..	..	361,995	69,893	35,594
February	"	..	..	582,735	113,689	79,656
March	"	..	..	711,002	103,967	100,615
April	"	..	..	367,781	56,014	98,214
May	"	..	..	243,189	38,616	112,616

SWEDEN.

During recent months conditions have changed slightly for the better. Due to known changes in regard to Japan's export policy during the last

weeks, there is, however, to be noted a considerably stronger competition from this country. In linings and similar styles Italian competition has grown stronger than previously.

No alterations in wages have taken place. The present agreement between employers and workers organisations will expire at the end of the year. At present it is impossible to tell what changes are likely to occur in the coming agreement as compared with the present.

(Svenska Bomullsfabrikantföreningen)

SWITZERLAND.

The unaltered weak situation of the raw cotton market has brought about a further deterioration in market possibilities for the cotton industry. The number of employees in full occupation fell in consequence of the closing down of mills, and also partially owing to holidays of a large number of operatives throughout the industry and at the same time the number of short-time workers increased. In spite of the partial expansion of work as a result of the finishing of staple articles for stock, the normal working of the spinning mills could only be estimated at approximately 80% of full time working, 60 to 65% in the doubling mills and in the various weaving sections only from 55 to 80% ; the grey weaving section, however, is far less occupied than the coloured section.

No alteration in wages has taken place.

The following is the original report in German :

Die unverändert schwache Haltung des Rohbaumwollmarktes hat der verarbeitenden Industrie eine weitere Verschlechterung der Absatzmöglichkeiten gebracht. Die Zahl der Beschäftigten sank zufolge vorübergehender Betriebsschliessungen und gruppenweisem Feiern grösserer Arbeiterkontingente auf der ganzen Linie und gleichzeitig stieg die Zahl der Kurzarbeiter weiter an. Trotz teilweiser Streckung des Arbeitspensums durch Anfertigung von Stapelartikeln auf Lager, konnte die normale Produktionskapazität in der Spinnerei nur zu ca. 80%, in der Zwirnerie zu ca. 60-65% und in den verschiedenen Webergruppen zu ca. 55 bis 80% ausgenützt werden, wobei die Rohwebereien erheblich schlechter beschäftigt waren als die bunte Sektion.

In den Lohnverhältnissen sind keine Aenderungen eingetreten.

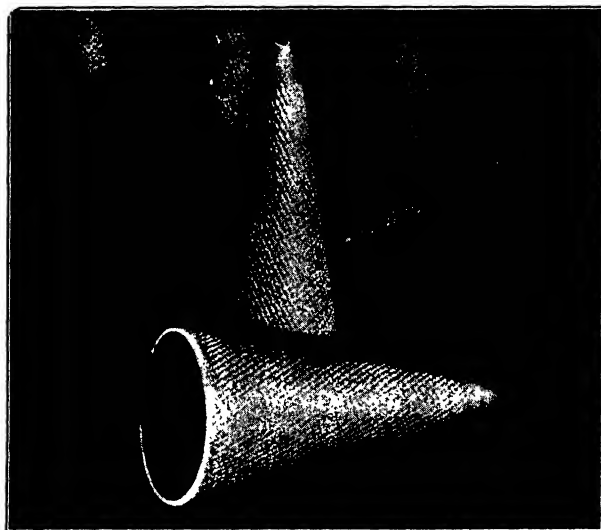
(Schweizerische Spinner-Zwirner und Weber Verein)

U.S.A.

The monthly report of the Census Bureau shows that the consumption of lint cotton by domestic mills in June amounted to 443,000 bales, against 426,000 bales in May and 681,000 bales in June of last year, making 5,307,000 bales so far this season, against 7,362,000 bales a year ago.

Exports for the month are returned at 176,000 bales, excluding linters, against 193,000 bales in May and 130,000 bales in June of last year, making 5,402,000 bales so far this season, against 5,316,000 bales to the same date last season. Stocks in the hands of manufacturers amount to 1,416,000 bales against 1,586,000 bales last month and 1,551,000 bales in the corresponding month of 1937, and in outside warehouses to 9,697,000 bales, against 10,058,000 bales and 3,092,000 bales.

Spindles active during June totalled 21,144,000, against 21,342,000 in May and 24,556,000 in June of last year.



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ARGENTINA

Picking of the 1937-38 Argentine cotton crop has been delayed by excessive rains and low temperatures, and the quality and yield of the crop has been effected unfavourably, according to a report issued recently by the U.S. Department of Agriculture.

The rains it was reported, also hampered the normal use of insecticides for fighting the leaf caterpillar which has been present in large numbers in all cotton fields of the country this season. Heavy locust damage was reported from some producing districts.

The second official estimate of the Argentine Government now places the crop at 281,000 bales of 478 lbs. each. This is a reduction of 15 per cent. compared with the first official estimate, issued early in March, of 332,000 bales from the record planting of 1,035,000 acres. The prospective current crop is much larger than the small crop last year. But despite the record acreage planted, the crop will be below the 373,400 bales harvested in 1935-36 and the 295,400 bales harvested in 1934-35.

Last season's low yield also was attributed to unfavourable weather conditions and insect pests. The area planted in 1936-37 amounted to 1,015,000 acres and the first official estimate was for a crop of 360,000 bales. Drought and insects, however, did great damage and only 713,500 acres were actually harvested, the crop amounting to 143,800 bales. This represented a yield of only about 96 lbs. per acre compared with the average of 234 lbs. per acre in 1935-36.

Largely as a result of favourable prices in recent years, the area devoted to cotton in Argentina was expanded from an average of 355,000 acres for the five years ending with 1933-34 to the present level of slightly more than a million acres. The Chaco Territory is the most important producing region. The crop in that region this season represents over 66 per cent. of the total. Most of the balance is grown in the provinces of Corrientes and Formosa.

The third estimate of the 1937-38 Argentine cotton crop issued by the Ministry of Agriculture on 7th instant, places the production of fibre at 53,800 metric tons, and states that 15 per cent. of the area sown may now be regarded as lost or abandoned. The second official estimate, issued in May last, gave the figure of 61,000 tons, whilst the first estimate in March was 72,000 tons. The further reduction in the anticipated yield is attributed to unfavourable weather conditions during the past two

months, which have retarded the development of the plants. On account of the backward condition of the crops, the Ministry's third estimate is not to be regarded as final. (*Bank of London and South America*)

Cotton exports during the first five months of 1938 totalled only 892 metric tons, compared with 7,554 in January-May 1937. During the first four months of 1938, cotton exports were small as the 1937-38 crop did not start to move abroad until May when 840.5 metric tons were shipped, all to Germany; the remaining 51.5 tons went to the United Kingdom, according to trade figures. In the first 5 months of 1937, none was shipped to Germany but 6,136.2 metric tons went to the United Kingdom.

AUSTRALIA

The 1938 cotton crop, the picking of which began in March, is expected according to official estimates, to reach about 18,000 bales, compared with 8,519 for the 1936-37 crop and 13,504 for 1935-36.

Cotton consumption for the calendar year 1937 is estimated at about 25,000 bales. The importation of considerable quantities of cotton was necessary. Deliveries of Australian cotton by the Queensland Cotton Board to the Australian mills in 1937 totalled 11,321 bales, compared with 13,533 in 1936. During 1937 spinning mills are reported to have increased their activity to a considerable extent. According to the Queensland Cotton Board, cotton spinners in Australia have overcome their initial difficulties and are now operating on a relatively efficient basis.

The Government is said to be considering a scheme whereby the spinners would be allowed to establish a reserve stock of imported cotton under customs control which would be released duty-free as needed after the Australian crop had been consumed, thus reducing the risk of running short of supplies which exists under the present arrangements whereby permits to import cotton duty-free are granted only after the size of the Australian crop becomes known, the permits covering only such quantity of cotton as is required to bridge the gap between Australian production and total requirements.

Ginning and Marketing : The seed cotton received at the ginneries is classed as to grade and staple by the classifiers of the Department of Agriculture and a tag bearing the grade and staple is attached to the bale. If the seed cotton contains excessive moisture, it is passed through the drying machine in order to obtain a better quality ginning. It is then baled, classed and weighed and a record is made of all details with respect to the name of the grower, railway station from which consigned, grade and staple, variety, tare and special lot number. The bales of seed cotton of one variety are always ginned together according to classification and cotton of different varieties is never mixed at the ginneries.

The marketing of the Queensland cotton crop is carried out entirely by the Queensland Cotton Board which handles, processes and markets the entire cotton crop, taking it from the actual grower and landing it at the spinning mill.

The Commonwealth Bounty payments made to growers for cotton production operates on a sliding scale. It is fixed at a certain figure when the spot price of American Middling at Liverpool is 6d. a lb. If the price of American in Liverpool rises to 7d., the bounty payment is reduced by 1d. If the price of American falls below 6d. the bounty is increased. For the 1937 season and for the 1938 and 1939 seasons, the amount of bounty payable to growers in Australian currency when the spot price of American at Liverpool is 5d. is 5.25d. per lb., when the price of American at Liverpool is 6d. the bounty is 4.25d. and when the price of American at Liverpool is 7d. the bounty is 3.25d.

The local production of *cotton linters* was not sufficient to meet the requirements of the Australian market owing to the smaller production of cotton. During the past two years there has been a large increase in the consumption of cotton linters, used extensively in the upholstering of automobile bodies. (*Office of the American Trade Commissioner, Sydney, and Report of the Queensland Cotton Board for 1937.*)

According to a later message the cotton crop of 1937-38 will be smaller than anticipated owing to insufficient rainfall, the crop being estimated at about 13,000 bales against 18,000 previously estimated.

BRAZIL.

While the results of classification of the Paulista cotton crop indicate an improvement this year compared with last season, the quality is unfortunately not so high as had been expected, and in many quarters it is believed that there may be a considerable carryover of low grades at the end of the year. Nevertheless, of the total of 126,211 tons of cotton classified during the period from March 1, last up to June 15, 79.26 per cent. was the basic type 5 or better, while the inclusion of type 6 brought the percentage up to 95.94 per cent. Up to the corresponding date of last year, 61.46 per cent. of the 96,347 tons classified was of type 5 or better, but, with the inclusion of type 6, the percentage was 88.35 per cent., thus indicating a greater proportionate balance of lower grade types than is the case this season. (*Bank of London and South America*)

The final official estimate of the production of cotton in the Northern States of Brazil during the current crop season is 171,500 metric tons, the output in the respective States being calculated as follows:—Parahyba, 45,000 tons; Ceara, 35,000 tons; Pernambuco, 30,000 tons; Rio Grande do Norte, 25,000 tons; Alagoas, 12,000 tons. Maranhao, 10,000 tons; Sergipe, 6,500 tons; Piahy, 4,500 tons; Para, 2,500 tons; North Bahia, 1,000 tons.

The first official estimate of the yield from the Southern cotton zone during the coming season is 306,500 tons, the anticipated production of the States in this area being as follows:—Sao Paulo, 250,000 tons; Minas Geraes, 3,5000 tons; Parana, 9,000 tons; South Bahia, 7,000 tons; Rio de Janeiro, 4,000 tons; other States, 1,500 tons.

The foregoing estimates indicate a much larger production in both cotton zones of Brazil. In the North, where picking takes place from

about August to January, the production last season was about 132,000 metric tons, whilst in the South, where the cotton is picked from about March to June, the yield in 1937 was approximately 243,000 tons, of which slightly more than 200,000 tons was produced in the State of Sao Paulo.

CHINA

A preliminary estimate places the 1938 cotton crop in China and Manchuria at 2,200,000 bales of 478 lb. as compared with 3,600,000 for 1937 and 3,100,000 for the 1932-1936 average. The large decline expected this year is the result of a heavy reduction in the planted acreage. In North China it is estimated that the planted acreage is around 50% below last season's harvested acreage. In all major cotton-growing districts the acreage has declined because of the military disturbances, which have contributed to the low prices received for last year's crop, the large stocks of cotton still on hand in the interior, and the desire to raise food crops. While the Japanese have been making plans for larger cotton crops in North China, their efforts thus far have not prevented a large decline in the 1938 acreage. In Manchuria, however, it is estimated that the cotton acreage is about 15% above that of last year.

It is estimated that cotton exports from China for the 1937-38 (October-September) marketing year will equal 370,000 bales, as compared with 182,000 bales for the 1936-37 season. Japan is the principal destination of the exports from China.

Imports into China (excluding Manchuria) on the other hand, for the 7 months from October through April of the current season have amounted to only about 10,000 bales of 478 pounds each. No important bookings of foreign cotton seem likely for some time, because of the large carry-over of Chinese cotton and the restricted mill consumption.

Cotton mill activity in China during May continued at about 50% of capacity, as compared with nearly 100% a year earlier. For the 1937-38 season the cotton consumption by commercial mills has been estimated at approximately 1,300,000 bales of 478 lb., as compared with about 2,600,000 bales for the 1936-37 marketing season.

The provisional government set up in China by the Japanese army considerably reduced the import duty on piecegoods, effective June 1. The new rate is expected to result in some increase in imports of piecegoods from Japan.

CHINA
IMPORTS OF RAW COTTON, APRIL 1938, WITH COMPARISONS
(In bales of 500 pounds)

Growth	April		October-April	
	1937 <i>Bales</i>	1938 <i>Bales</i>	1936-37 <i>Bales</i>	1937-38 <i>Bales</i>
American	2,073	—	10,752	1
Indian	1,363	2,606	7,332	7,434
Egyptian	1,919	147	19,638	441
Others	1,555	306	16,672	1,792
Total	6,910	3,059	54,394	9,668

(U.S. Dept. of Agriculture)

CHINA COTTON PRODUCTION 1937-38.

FINAL ESTIMATE.

			AREA (Acre)		YIELD (Bales of 500 lbs.)
Hopeh ..	..	..	2,282,018	..	590,138
Hunan ..	..	..	118,757	..	32,755
Kiangse ..	..	..	15,091	..	4,984
Anhwei ..	..	..	325,032	..	113,528
Kiangsu ..	..	..	1,947,849	..	513,901
Chekiang ..	..	..	268,137	..	109,326
Shantung ..	..	..	918,374	..	359,432
Shanse ..	..	..	376,783	..	138,682
Honan ..	..	..	1,064,650	..	299,282
Shense ..	..	..	794,886	..	235,368
Hupeh ..	..	..	1,309,088	..	334,516
Szechuen ..	..	..	351,110	..	70,955
Total ..	..	..	9,771,775	..	2,802,867

COLUMBIA.

A conference between the representatives of Colombian cotton planters and textile manufacturers and merchants was held in Bogotá from 16th to 20th instant, with a view to studying measures to foster the national industry. One of the measures taken was the election of members of the National Cotton Board which had been set up by Decree issued on March 21 last to foster cotton growing in the Republic and to limit imports to types of cotton which cannot be produced locally.

No solution was reached to the differences of opinion regarding prices between planters and manufacturers of cotton. The factories now offer 60 cents per kilo, on the grounds that that is the total cost of the qualities of imported cotton for the type of article they produce, and to pay more would prejudice their efforts to compete successfully with imported finished goods of similar class. The growers ask for 75 cents per kilo, as, they claim, the heavy initial outlays and the present small extent of plantations make it unremunerative to sell for less. Any increase in the import duties on raw cotton is precluded by the Commercial Agreement with the United States, so that the view has been expressed that, if it is desired to foster cotton-planting, the Government may have to consider some form of subvention. Another problem is that the cotton grown in Tolima and Cundinamarca is of too fine a quality for the requirements of the factories, and, being too long in staple, there is a 20 per cent. wastage. At present, no use is made of cotton by-products, but steps in that direction are being taken, particularly towards the utilisation of the seed for cattle-food.

(Bank of London and South America Ltd.)

FIJI

The Government's policy of stimulating cotton growing is being continued, though the crop is not likely to make much headway in the sugar cane areas. Sea Island cotton only is now grown in the northern districts, and the Fiji backcross only in the western districts. The two varieties are thus well segregated and are ginned at separate ginneries. For the backcross the weather was favourable in 1936-37, but the season

was against the Sea Island and the yield was extremely low. Unfortunately, planting in the Sea Island districts has been delayed this season by a drought lasting nearly four months, and when the rains came, the cultivators naturally gave their rice plots their first attention. The districts in which Sea Island is grown have been extended by the inclusion of small islands near Suva, and of an area on the island of Vanualevu. The Government purchase the cotton at fixed prices in two grades for both kinds of cotton grown.

In certain areas in which it has been found that even ordinary rains are liable to cause soil erosion, Fijian methods of cultivation are being tried. According to Fijian practice, the soil is left undisturbed except the actual hole in which the seed is sown, and the undisturbed soil is retained under cover of grass which is kept slashed. If these methods prove successful, they involve a minimum of expenditure and labour, and should encourage the Fijians to take up the crop. Trials are being carried out with cotton in mixed cultivation with maize, groundnuts, etc.

(The West Indian Committee Circular)

GREECE

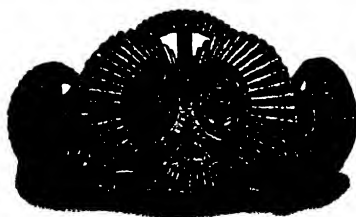
Cotton production in 1937 increased to 46,000,000 lbs. of lint cotton, from 37,000,000 lbs. in 1936, according to estimates of the Greek Cotton Institute. The area planted was 203,000 acres in 1937, against 179,000 in 1936. The quality of the crop is said to have shown an improvement as a result of the efforts of the Government, the Cotton Institute, the Agricultural Bank, and the growers toward developing better varieties, picking, ginning and classing. Experimental work was continued during the year without interruption. Modern gins have been imported and ginning equipment is said to have increased by about 10 per cent. over that at the end of 1936.

Since May, 1936, the allocation of import quotas for raw cotton every six months has been discontinued. Imports of long staple (over 30 millimetres) are subject to a permit from the Ministry of National Economy, but imports of medium and short staples similar to those produced in Greece require a permit by the Ministry of National Economy, the Ministry of Agriculture and the approval of the Cotton Institute. As a rule, permits for the latter are issued only when there is a shortage of domestic cotton, while permits for the long staple are issued only to spinners of the finer counts. However, exporters of yarn and fabrics get import permits without difficulty. Cotton consumption in 1937 is estimated to have approximated 50,000,000 lbs., of which 44,000,000 were domestic cotton.

Cotton exports in 1937 totalled 16,000 lbs., all shipped to the United Kingdom. The Government has decided to encourage exports by allocating a premium of one drachma per oke (about 0.35 cents per lb.) to exporters.

Prices for domestic cotton were maintained at levels higher than the landed and duty paid cost of American cotton.

(Textile Raw Materials)

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HAITI

In the export of cotton the difference in quantity and price is still greater when compared with exports of 1937. Shipments for the month of March 1938, showed a decrease of 37 per cent. in quantity and 45 per cent. in value as compared with those of the corresponding period of last year.

From October 1, 1937, to March 1938, shipments of cotton were 2,179,573 kilos valued at Gdes. 2,586,014, while for the corresponding six months of the last fiscal year they were 3,403,662 kilos valued at Gdes. 4,725,216. The decrease for the present year is 36 per cent. in quantity and 45 per cent. in value.

(Department of Overseas Trade)

ITALIAN COLONIES

Systematic efforts are being made to increase cotton culture within the Italian Empire. In 1937, one-fifth per cent. of the total requirements was provided from the Empire. (The total cotton import was 1,654,000 metric centners.) Two organisations have been started—the *Compania per il Cotone d'Etiopia*, with a capital of 35,000,000 lire, and the *Ente per il Cotone dell'Africa Orientale*. It is hoped to reap a crop of 50,000 centners in 1938. The Italian culture is of more importance than that of the African territories. In 1936 the Italian crop was 21,000 centners; it is hoped to get 40,000 in 1938, and the ultimate objective is 100,000. The principal cotton regions in 1937 were Sicily (crop 37,500 metric centners), Apulia (3,240), Lucania (813), Campania (487), Calabria and Latio.

(Manchester Guardian Commercial)

MEXICO

The 1938-39 crop is estimated by the cotton trade at about 260,000 bales. This estimate is based on the assumption that the production in the Laguna District will be approximately 75,000 bales, which is much below normal for that district. If the crop is around this figure relatively little of the crop will be left for export, inasmuch as recent consumption has been in the neighbourhood of 215,000 to 240,000 bales. The domestic price for Mexican cotton is kept at a high price for the benefit of the growers and is said to average from \$5 to \$10 U.S. currency per bale above the price for American cotton.

(Textile Raw Materials)

PERU.

Cotton exports during January-April, inclusive, totalled 5,462 metric tons, compared with 8,936 in the corresponding period of 1937. The decline of 3,474 metric tons reflected mainly smaller shipments to the United Kingdom which were 1,904 tons in the four months of 1938, against 5,068 tons in the 1937 period.

(Textile Raw Materials)

ST. VINCENT

The weather during the first quarter of 1938 was very favourable for the cotton crop. The dry season commenced at the end of December and thereafter the rainfall, though light, was well distributed and almost ideal for picking the crop. Picking was fairly general throughout the island early in January and the crop was practically over by the end of March. Yields were exceptionally good and it was expected that a record crop would be produced. According to a revised estimate, the production of *Sea Island* ginned cotton would reach 5,600 centals (1,172 bales of 478 lb.) as compared with 4,178 (874) in 1936-37 and 1,924 (403) on the average of the preceding five seasons. Percentages : 134.0 and 291.0.

The proportion of stained cotton was reported to be very low and this is no doubt due in part to the very favourable weather and in part to the generally low incidence of cotton stainers and pink boll-worm. The close season for 1938 has been fixed from May 1 to August 15. During this period no cotton or certain other closely related malvaceous plants may be grown.

(*International Institute of Agriculture*)

SUDAN

The Department of Agriculture and Forests Khartoum have issued their May estimate for cotton as follows :—

		Area Feddans		Yield Bales of 400 lbs.	
		1937-38 May	1936-37 June	1937-38 May	1936-37 June
Sakellaridis Irrigated :—					
Gezira	{ S.P.S. Ltd.	167,982	167,288	} 236,744	186,641
	{ K.C.C.	38,671	31,837		36,085
Tokar	.. ..	20,000	43,000	7,029	29,807
Kassala	.. ..	31,850	30,335	15,750	17,090
Dueim (Government Estates)	.. ..	526	500	565	524
Gondal (Government Estates)	.. ..	390	450	493	663
Abdel Magid	.. ..	1,720	—	2,604	—
Private Estates	.. ..	11,629	11,029	10,185	10,028
Total Sakel. Irrigated ..		272,768	284,439	273,370	280,838
American Irrigated :—					
Northern Province :—					
Berber (Government Pumping Schemes)	.. ..	2,420	2,484	3,079	2,830
Dongola (Government Pumping Schemes)	.. ..	2,177	2,264	2,141	2,263
Zeidab (Private Estates)	.. ..	5,159	5,269	5,242	5,321
Other Private Estates	.. ..	2,096	1,625	1,621	990
Total American Irrigated..		11,852	11,642	12,083	11,404
American Rain Grown :—					
Kordofan	.. ..	116,000	125,000	28,967	24,555
Upper Nile	.. ..	7,500	8,500	722	1,250
Equatorial	.. ..	18,698	27,800	3,146	5,268
Total American Rain Grown		142,198	161,300	32,835	31,073
Total Sakellaridis and American		426,818	457,381	318,289	323,315

TANGANYIKA

It was reported by the beginning of March that cotton seed distribution had been normal in the Eastern, Northern and Tanga Provinces, and an increased acreage was reported in several districts. If nothing unforeseen occurs, a crop up to the proportion of last year may be expected for these provinces. In the Mwanza district of the Lake Province, cotton plantings showed a big decrease in acreage. Elsewhere conditions were on the whole fairly good. The total amount of ginned cotton available for export in 1938 was estimated at 188,000 centials (39,000 bales of 478 lb.) as compared with 258,000 (54,000) actually exported in 1937 and 158,000 (33,000) on the average 1932 to 1936. Percentages: 73.0 and 119.6.

(International Institute of Agriculture)

COTTON GROWING IN THE BRITISH EMPIRE

At the thirty-third annual general meeting of the British Cotton Growing Association held recently in Manchester, Sir William Himbury, the chairman, stated that the year had not been without its anxieties, but had shown satisfactory progress. In the cotton-growing countries of the Empire the chief honours went to Uganda for producing a crop of 338,400 bales. This was easily a record for that Protectorate. The Sudan made a good second with 332,900 bales, the major portion of which was the well-known Sudan Sakel, amounting to 295,000 bales. This was a record for that country also, and both afforded proof of the energy, enthusiasm, and team work of all the officials concerned. Together the two countries were responsible for 80 per cent. of the total production in Empire fields, which had now reached the new high record of 829,600 bales.

Uganda's exports of cotton exceeded those of any previous year by more than 17,000 bales, and its cotton and cotton seed together formed nearly 82 per cent. of the value of all the country's domestic exports. Although other crops were encouraged and some, such as coffee and tobacco, were developing, it appeared certain that for many years to come cotton would remain the main source of the country's prosperity. Existing low prices for cotton and other produce were reducing the spending power of the people, but some alleviation was being effected by the adoption of more scientific methods in obtaining larger yields and producing higher quality of produce. The Government of Uganda was spending large sums on the erection and staffing of agricultural colleges and laboratories and might ask for some assistance from Lancashire towards its scheme.

Tanganyika Territory was another fairly large producing area, but last season the crop suffered a setback through unseasonable rains. But for this, 75,000 bales would probably have been harvested instead of the actual figure of 60,100 bales. A crop of 100,000 might be expected in

the near future in the opinion of the Director of Agriculture. Kenya's production rose from 14,500 bales in 1936 to 17,800 bales last year. In 1933 it was only 3,100 bales.

Commenting on his visit last winter to the Punjab and Sind, Sir William said that in Sind he was impressed with the possibilities for cotton growing. There had been an increase in the area under cotton, mainly due to the availability of an easier water supply to the large tracts of land under the Lloyd barrage and canal systems and to a great interest being taken in cotton by the local zemindars. Another notable feature in this development was the increase in cultivation of Sind American varieties of cotton.

Turning to prospects for the current year, Sir William spoke of the prospect of bigger crops from Uganda, the Sudan, and Nyasaland. Smaller crops were likely in West Africa and one or two other countries, but, taking a long view of Empire cotton-growing countries and ignoring seasonal setbacks common to all places, he was convinced that there was every reason to expect greater production.

COTTON GROWING IN SOUTH AMERICA

According to a recent report of the New York Cotton Exchange Service, during recent weeks there have been a number of interesting developments with respect to cotton growing in South America. These have been partly unfavourable and partly favourable, from the standpoint of the output of cotton in that Continent. Three countries of South America, these being Argentina, Peru, and Paraguay, have failed to make as much cotton this season as they expected a few months ago. On the other hand, the big cotton growing country of the Southern Continent, Brazil, is fulfilling expectations and gives promise of maintaining its production, for the present at least. Argentina was expected earlier this season to make 350,000 to 400,000 bales, but its current season production is now estimated at only 250,000 to 275,000. Peru was expected to produce within the current season around 425,000 bales, but latest advices are that its production may total only about 350,000. Paraguay reported earlier in the season that its crop might total 75,000 to 80,000 bales, but recent reports indicate that its output may be only 30,000 to 35,000. Bad weather and insects are responsible for these drastic reductions. With current low prices for the staple, they may prove discouraging to growers. In Brazil, on the other hand, South Brazil is now gathering the largest crop it has ever raised, totalling around 1,400,000 to 1,450,000 equivalent 478-lb. bales, and this crop is reported to be of high average quality, while North Brazil, which harvested in the later months of last year its largest crop to date, estimated at 775,000 to 825,000 bales, is reported to have devoted to its next crop, which it will harvest in the later months of this year, an acreage equal to or slightly larger than the acreage to the last crop. At the time of writing, it is stated, growing conditions in North Brazil are much better than they were at this time last season. It is

believed that growers in North Brazil would have extended their acreage this season but for the fact that low prices for cotton made it impossible for them to finance larger plantings.

COTTON CULTIVATION IN PERU

(Extracted from "Foreign Agriculture," published by the U.S. Dept. of Agriculture.)

Once outranked by sugar, cotton has now become the most important agricultural export crop of Peru. Its production is confined almost exclusively to the irrigated valleys of the coastal region, particularly those in the central area between Pisco and Supe, and in the Piura area in the extreme north. Production in the interior valleys and in the trans-Andean region is insignificant.

Cotton is grown not only on large plantations, as is sugar, but also by many small landowners. Cotton gives employment to more than 100,000 workers, including ginners, mill and transport workers. Aside from the regular workers, it gives temporary employment to many itinerant labourers who come from the mountain regions for the harvest, returning to their homes at the close of the season. Since more than 85% of the crop is exported, to a value, including by-products, of \$24,000,000 in 1936, it is an important item in the country's balance of international payments. To a considerable extent the economic well-being of the nation depends upon the price of cotton.

The importance of Peruvian cotton as a factor in the world cotton trade, however, lies not in the quantity exported, which at its peak in 1937 amounted to only 355,715 bales, but in the staple length of the crop, which averages about $1\frac{3}{8}$ inches. Peru ranks seventh in world cotton production.

Historical development.—Textiles found in prehistoric tombs indicate that cotton was grown and used by the Incas for centuries prior to the Spanish invasion. It was slow in developing on a commercial scale during the colonial era, however, and in the early years of Peruvian independence. The cotton gin did not reach Peru until long after its invention in the United States, and transportation to world markets was too costly for Peruvian cotton to compete successfully. Vessels sailing around Cape Horn could not transport cotton profitably to Europe at rates comparable with those from the American South. For the same reason, it was costly to import food products, and Peruvian agriculture was largely devoted to food products until comparatively recent years.

As in many other areas, a temporary increase in Peruvian cotton production took place when the Civil War in the United States cut off England's supply of cotton from the South. Resultant high prices and encouragement from British spinners at this time stimulated cotton-growing in almost all areas to which the crop was adapted, including

Peru. The opening of the Panama Canal in 1914, which shortened the sea route to the European markets, reduced shipping costs and was undoubtedly an important factor in the subsequent development of the Peruvian cotton industry.

Basic factors.—Certain of the basic conditions underlying Peruvian cotton culture do not change. The principal of these is the fact that the crop is grown only in the valleys of the rainless coast (except for insignificant amounts in the Amazon region) and consequently is entirely dependent upon irrigation. The climate is semi-tropical ; there are no killing frosts and no rain to discolour the fibre. In most of the valleys cotton will not yield well without fertilizer, but guano from the islands off the coast is available. The cotton planters usually use from 200 to 250 lb. of guano per acre.

The fruiting of cotton depends upon the date of planting, which in turn is determined by the time when water is applied to the soil. The rivers rise at different seasons as the sun moves southward and melts the snow and ice in the high mountains. Consequently, there is no general cotton planting and harvesting season and no rush of the entire crop of cotton to market at one time. The fact that the growing season is much shorter for some varieties than for others also contributes to differences in the harvest period. In the northern (Piura) district, picking lasts from July to November ; about 200 miles south, in the small valleys watered by the Santa, Nepena, and Casma Rivers, it extends from March until June ; still farther south in the valleys between Supe and Pisco, where the most important cotton-producing areas are located, it runs from April to September.

Acreage and production.—The area devoted to cotton in Peru, as shown in Table 1, has increased considerably since 1921, most of the increase having taken place since 1932. During the 5 years from 1921 to 1925, the cotton area averaged 281,000 acres, and from 1932 to 1936 approximately 361,000 acres.

Over the short term at least, cotton acreage in Peru does not appear to show a high degree of sensitivity to price changes, probably because the major competitive crop, sugarcane, is a perennial crop, and one which involves heavy investment in plantation and manufacturing equipment. It is to be assumed that sugar planters are reluctant to shift to other crops without assurance that the alternative crops will prove more profitable than sugar over a long period of time.

While it is frequently reported that there has been a considerable shift from sugar to cotton in Peru, statistics relating to sugar indicate that the total acreage devoted to cane showed little variation over the period from 1921 to 1936. During the 5 years 1921–1925 the area in sugarcane averaged 130,000 acres, while in the 5-year period from 1932 to 1936, it averaged 132,000 acres. Doubtless what has occurred is that (1) a substantial part of the new land brought under irrigation has been planted to cotton, and that (2) while certain of the less efficient sugar plantations have shifted to cotton, the more efficient ones have increased acreage sufficiently to offset this shift so far as total cane acreage is concerned.

With regard to possible further expansion of cotton acreage, it is reported that more than two-thirds of all the land on the coast to which it is economically possible to bring water is already under cultivation. The cost of irrigating the remainder will doubtless be substantially higher than in the case of the areas now under cultivation, and progress is likely to be slow. Also, the portions of the sugar districts which are expected to prove more profitable in cotton than in sugar have doubtless already been shifted to cotton, and despite low prices for sugar, investments in the industry are so heavy as to restrict further shifts in the near future.

TABLE I
COTTON ACREAGE, PRODUCTION, AND YIELD IN PERU, 1921-1937

Year	Area planted <i>Acres</i>	Production <i>Bales of 478 pounds</i>	Yield per acre <i>Pounds</i>
1921	267,748	186,109	332.3
1922	275,339	198,875	345.3
1923	280,607	212,140	361.4
1924	287,175	214,842	357.6
1925	292,858	209,700	342.3
1926	315,949	246,168	372.4
1927	315,922	245,615	371.6
1928	283,251	224,528	378.9
1929	313,528	302,514	461.2
1930	330,343	270,071	390.8
1931	313,545	233,835	356.5
1932	304,094	242,474	381.1
1933	322,419	277,780	411.8
1934	366,986	341,962	445.4
1935	400,519	392,839	468.8
1936	409,000	404,000	472.2
1937	*	424,000	—

Compiled from Extracto Estadístico del Peru—1934-1935, and reports of the International Institute of Agriculture.

* Data not yet available.

Yields.—Average yields of cotton for the whole of Peru are usually much higher than those for the United States, but are somewhat lower than the average from the irrigated land in the southwestern part of this country. Nevertheless, annual yields of cotton in Peru, as in other places, are affected by climatic factors. Fogs and mists are heavier in some years than others, the time and amount of available irrigation water may vary, day and night temperatures may show greater or less variance, and insect damage is much greater in some years than others. The long-term trends in yields has been upward, however, due in large part to governmental campaigns to encourage the use of fertilizer, to control insect pests, and to improve methods of cultivation. Improvement in irrigation facilities has doubtless contributed also to the upward trend in yields. Cotton is often grown in small patches and cultivated by hand with meticulous care, which tends to raise the average yield for the country as a whole. The facts that Peruvian cotton, being long-staple, commands a premium on world markets, and that yields are heavy, have usually served to keep the industry on a profitable basis despite high costs of land and fertilisation.

Varieties.—The principal variety of cotton grown in Peru is that known as “Tanguis.” Through experimental work carried out on his cotton plantation in the Pisco Valley, South of Lima, from 1912 to 1916, Fermin Tanguis succeeded in developing a type of cotton resistant to Fusarium wilt, which was then the worst disease of cotton in Peru. The strain of cotton developed by Mr. Tanguis was not only highly resistant to this wilt, but it produced from 20 to 30% more cotton to the acre than any other type then being cultivated. In a very short time it was the only cotton being grown in the Pisco district, and by 1923 it was estimated to constitute 70% of the entire Peruvian crop. In 1936, production of Tanguis cotton reached approximately 359,000 bales, or about 89% of the entire crop, and it was practically the only type of cotton grown in the valleys in the central coastal region. The staple runs from $1\frac{3}{16}$ to $1\frac{1}{4}$ inches in length, and is white and moderately smooth. The plant is perennial and will produce up to seven crops from one planting the second crop usually being the best.

“Pima” cotton is a recent newcomer to Peru. This is a variety of long-staple cotton developed in the south-western United States, where it was bred from an Egyptian stock. It is grown only in northern Peru, and in 1936, about 24,000 bales of Pima cotton were produced, constituting 6% of the entire Peruvian crop. It has completely displaced the “Aspero” or “Fully-rough Peruvian” variety in the northern valleys. The reason for the change was that “Aspero” cotton was from a perennial plant or tree having a life span of some 15 years, which formed an ideal host for insects and cotton plant diseases. Insect and disease damage became so severe in the warmer valleys of northern Peru as to jeopardise the industry until cotton experts advised the substitution of quick-maturing annual varieties. Pima cotton staple runs from $1\frac{1}{4}$ to $1\frac{1}{2}$ inches in length, is of a cream colour and is very fine, silky and strong.

Tanguis cotton cannot be grown profitably in the more tropical northern valleys because the plant does not fruit until 9 months after planting, and this gives insect pests too much time in which to multiply. Pima cotton fruits within about four months from planting and enables the farmer to win the race with insects. The growing of perennial cotton plants is prohibited by law in the Piura district in northern Peru, and is discouraged elsewhere.

“Acala” is a variety of medium-staple cotton produced in the Piura district and fruits in an even shorter period than does Pima. In 1936, about 8,000 bales of this cotton were produced, constituting approximately 2% of the total Peruvian crop.

Miscellaneous varieties accounted for about 13,000 bales, or the remainder of the crop, in 1936. Of this remainder, Delfos cotton accounted for somewhat more than 5,000 bales, and Semiaspero slightly less. The latter is the only variety of cotton grown east of the Andes in Peru, and is exported from Iquitos, Peru's port on the Amazon.

Diseases and pests.—In the coastal valleys of central Peru, where Tanguis cotton is grown, the Government is encouraging the farmers to destroy the plant after the harvest of the second year, to curb the ravages of insects and diseases. Naturally, growers are reluctant to destroy

these living plants and engage in what appears to be the wasteful and unnecessary work of replanting. Tanguis cotton was resistant to the only wilt disease (*Fusarium*) known in Peru at the time this variety of cotton was developed. Recently, however, verticillium wilt, then unknown, has become a major danger to Tanguis cotton, which is not resistant to this type of wilt. Research is under way by experts, but it is difficult to find a strain which will resist this wilt and still retain the excellent qualities of Tanguis.

The principal fungus diseases are : brown or black leaf stain, manta blanca, and boll stain. All of these are worse in the tropical climate of Piura than they are farther south, but none of them constitutes a major difficulty in cotton growing.

Insect pests common to Peru that are influenced by variations in weather conditions are the sucker beetle (*Gasterocercodes gossypii*) and the boll borer. Those that are influenced by changes in weather from year to year are leaf worms, plant lice (aphids), *arrebataados* or cotton stainers, and crickets. Another group partly affected by weather conditions includes the Peruvian weevil, the plowing worm (*Ligyris maimon*), and other beetle larvae. The cotton stainer does far more damage than all the others together, and thrives best in foggy, cool weather as do fungus diseases. The other pests are not serious except at times in a given locality. The boll weevil of Mexico and the United States has never reached Peru.

Finance and taxation.—From 25 to 50% of the Peruvian cotton crop is usually sold before it is ready for picking. Prices are based on samples of cotton produced during the previous season on the same farm, and are subsequently adjusted if the quality of the new crop differs. Loans are advanced by banks, cotton buyers, and financing institutions, up to 40 or 50% of the estimated value of the cotton to be sold, at interest rates ranging from 6 to 10%. Agricultural banks finance the farmer without requiring the immediate sale of his cotton, but they maintain a more or less strict jurisdiction over the marketing of it.

Legislative provision is made for assessment of a special export tax on cotton, which however, is not operative at the present time. The tax is based on the Liverpool price of " Good fair " Tanguis cotton and amounts to 10% of the proceeds of cotton exports after the cost of transportation to Liverpool and the cost of production as estimated by the Government have been subtracted. Thus when prices are below the officially estimated cost of production plus freight, as at present, no export tax is assessed. The officially estimated cost of production is now equivalent to about 10 cents per lb., and of transportation, 3 cents per lb.

Ginning facilities.—There are 89 gins in Peru. Most of them are owned and operated by plantation owners but also do outside work for small growers. American gins predominate and saw gins are increasing more rapidly than roller gins. Mechanical dryers have been installed by some ginners because a great deal of cotton is picked in foggy or misty weather, and it is claimed that the improvement in the quality of the cotton more than justifies the additional expense. Ginning is usually paid for in cotton seed by small planters, although some of them sell their seed cotton to the ginners before ginning. Prices of seed are fixed each year

by agreement between ginner and growers and ranged from 3.50 to 4.00 soles per quintal (\$17.25 to \$19.75 per short ton) in 1937.

Export trade.—About 85% of Peru's cotton production is exported. The United Kingdom has been traditionally the major export market for Peruvian cotton, followed in importance in recent years by Germany, Japan, Belgium and France. Exports to the United States have been insignificant since 1929.

TABLE 2

EXPORTS OF RAW COTTON FROM PERU, 5-YEAR AVERAGES
1901 TO 1920, ANNUAL 1921 TO 1937
(In bales of 500 pounds gross)

Year ended December 31				Exports <i>Bales</i>	Year ended December 31		Exports <i>Bales</i>
Average					Annual		
1901-1905		..	..	33,942	1926		220,610
1906-1910		..	..	65,446	1927		249,491
1911-1915		..	..	90,882	1928		205,204
1916-1920		..	..	118,488	1929		200,232
Annual					1930		240,847
1921	..	..	..	160,190	1931		206,774
1922	..	..	..	174,772	1932		204,714
1923	..	..	..	186,937	1933		241,770
1924	..	..	..	176,120	1934		296,744
1925	..	..	..	175,054	1935		340,922
					1936		348,865
					1937*		355,715

Compiled from Extracto Estadístico del Peru and Annario del Comercio Exterior del Peru.

* Preliminary.

Domestic consumption.—There are 16 textile mills in Peru, 11 of which are located in Lima. Mill consumption has increased rather sharply since 1932, but still accounts for less than 10% of total cotton production. The devaluation of Peruvian currency in 1932 gave temporary stimulus to the domestic manufacturing industry. During 1935 imports of textiles were so heavy, however, that import quotas were imposed on each country supplying textiles to Peru. By the end of 1935, they were found to be unnecessary, and all were removed except those on Japanese textiles.

TABLE 3

MILL CONSUMPTION OF COTTON IN PERU, 1921-1936
(In bales of 478 pounds)

Year			Mill consumption	Year	Mill consumption			Year	Mill consumption		
			<i>Bales</i>				<i>Bales</i>				<i>Bales</i>
1921	..	..	13,167	1927	..	..	18,862	1933	..	..	23,983
1922	..	..	12,858	1928	..	..	18,337	1934	..	..	28,387
1923	..	..	14,085	1929	..	..	16,562	1935	..	..	29,767
1924	..	..	15,570	1930	..	..	16,823	1936	..	..	30,032
1925	..	..	14,072	1931	..	..	17,532				
1926	..	..	16,271	1932	..	..	18,216				

COTTON GROWING IN UGANDA

The following article is extracted from the recently published East African supplement to the *Manchester Guardian Commercial* :—

Cotton, which is the principal export commodity of Uganda, is almost entirely produced by natives on thousands of small plots scattered throughout the protectorate. The ginning industry is mainly in the hands of Indians, while exportation is effected by a few large companies. The crop is planted with the rains between May and August and harvested in the dry season between December and March.

There is a legend that "native cottons" have been grown in certain areas since ancient times, but it is probable that they were of Arab introduction and not indigenous, and although Sir Samuel Baker introduced Gallini cotton in 1872 it was not until the period 1903–10 that the importation and trial of new varieties was undertaken, as a result of which the Government encouraged the commercial exploitation of the American Upland type and advised on its cultivation. In 1906 there was a crop of 500 bales and by 1910 it had risen to 12,000 bales.

A second well-marked period was from 1911 to 1920 when, developing on the basis of two American varieties, Sunflower and Allen, the crop rose to about 50,000 bales. Experimental work was commenced in 1911, and the "Buganda Local," a type which is still grown, survives from this period, besides other strains derived from Nyasaland Upland cotton introduced in 1915.

During the third period of development, selection and breeding work has been continued with good results, experimental work has been greatly extended, and measures have been taken to disseminate the knowledge gained through a field staff of agricultural officers with African assistants. The seed supply, cultivation, and marketing are now closely supervised and legislation has been enacted to empower the Government to exercise control where and when necessary in the best interests of the industry. By the 1937–38 season the crop had risen to nearly 350,000 bales of 400 lb. each.

A well-organised control of seed supplies exists. When a suitable type has been selected or bred, it is passed through increase stages at experimental stations, of which there are two, one for the area east and one for the area west of the Nile. Thence it is multiplied in segregated areas until there is sufficient seed to supply a zone into which movement of other cotton is prohibited. The crop from the zone can only be marketed within that zone, so, by requisitioning seed from ginneries, a pure supply is ensured. Growers obtain their seed from the ginneries free of charge.

☛ The main factor which causes Uganda to be the most important cotton-growing country in the colonial Empire is the uniformity of the crop from year to year, which enables spinners to buy with confidence. In view of the growing tendency for sales of yarn to be made ahead this continuity of quality is a characteristic of increasing importance.

Although there appears to be a tendency for Lancashire to take a larger share of the crop, by far the greater proportion is still shipped to the Far East. In 1937, for instance, the exports were roughly made up as follows :—

	Bales
To India	215,000
To Japan	90,000
To Lancashire	20,000

The prices received for the 1937 crop were good, as it was sold before prices began to fall. Weather conditions for the current year's crop have been good, and the 1937 prices encouraged the native to extend his area by nearly 20 per cent. The heavy fall in prices will probably offset this tendency to some extent ; nevertheless the exports for 1938 are expected to reach the record total of 400,000 bales.

Cotton is such an important factor in the economic life of Uganda—in 1937 lint cotton and cotton seed represented over 80 per cent. of the total value of domestic exports—that the recent heavy fall in prices will undoubtedly reduce for the moment the purchasing power of the native community and lead to a serious restriction of imports. But Uganda cotton has now established a reputation for quality and uniformity that will make the protectorate a more and more important factor in Empire-grown cotton as years go by, and, when prices recover, the future prosperity of this part of East Africa will remain assured.

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CENTRALISING SEA ISLAND COTTON BREEDING WORK

At a recent meeting of the West Indian Sea Island Cotton Association, Mr. G. A. Jones, the president, gave an historical sketch of the development of cotton breeding work in Montserrat. During the last six years the Geneticist to the Empire Cotton Growing Corporation Research Station in Trinidad has directed and supervised the pedigree seed production in Montserrat. Mr. Jones also stated that the cotton growers in Antigua and St. Kitts had satisfied themselves that the Montserrat strain was the most suitable for their islands, and that he had no doubt that as the result of trials now in progress it would also prove to be the most suitable for Nevis and Anguilla. It was agreed that the station in Montserrat be organised as the central breeding station for the islands cultivating the Montserrat strain. In a memorandum, Mr. J. B. Hutchinson, the present Geneticist at the Trinidad Research Station, says he has no doubt that with a programme of breeding work at two stations (St. Vincent and Montserrat) the present standard of quality and yield will be maintained at the lowest cost and the possibilities of further improvement will be best exploited.

(*West India Committee Circular*)

COTTON BALE ENQUIRY

In January of last year we published in *International Cotton Bulletin*, No. 58, the detailed results of our "Cotton Bale Enquiry," a collation of information concerning the weights, densities, measurements, staple lengths and other details relating to the covering and banding of cotton bales produced in various parts of the world. The information published in the following pages can be taken as being complementary to that which has previously appeared as it consists of replies which have been received since the previous tabulations were prepared.

In the preparation of these tabulations we have been greatly assisted by the following to whom we tender our grateful thanks :—

The British Government Department of Overseas Trade, H.M. Consuls, Agricultural and Trade Commissioners in the British West Indies, the Dominican Republic, Nicaragua and Portuguese East Africa, the Chief of the Department of Agriculture of the Iranian Government, Messrs. Java Sumatra Handelmaatschappij, Jacobson Van den Berg and Co., and Ronwenhorst, Mulder & Co., of Java, and the Chief of the Repartição Técnica de Agricultura de Moçambique.

REMARKS—IRAN

There has been no difference between bales for export or for domestic purposes, and measurements are not uniform, but the Société Anonyme de Coton, Laine et Peau intends to establish new heavy presses in the exporting centres or other convenient points in order to standardise the measurements and weights of bales.

COTTON BALE ENQUIRY (continuation)

(A) MEASUREMENT, WEIGHTS, AND DENSITY OF BALE.

Country	Overall Measurement of Bale	Gross Weight of Bale	Net Weight of Bale	Density of Bale
1. British West Indies—				
(a) Anguilla	259 lbs.	255 lbs.	18.2 lbs. per cu. ft.
(b) Antigua (1)	309 lbs.	300 lbs.	—
(2)	307 lbs.	300 lbs.	—
(c) Montserrat (1)	409 lbs.	400 lbs.	26½ lbs. per cu. ft.
(2)	612 lbs.	600 lbs.	16½ lbs. per cu. ft.
(d) Nevis	462 lbs.	450 lbs.	14½ lbs. per cu. ft.
(e) St. Kitts	562 lbs.	550 lbs.	16 lbs. per cu. ft.
2. Dominican Republic	220 kgs.	216 kgs.	—
3. Iran..	500 lbs.	488 lbs.	15 lbs. per cu. ft.
4. Java (1)	140 kgs.	135 kgs.	—
(2)	145 kgs.	140 kgs.	—
(3)	163 kgs.	155.7 kgs.	—
	2 single bales, pressed together by iron hoops into 1 double bale, 74 × 66 × 67 cms.	(double bale)	(double bale)	475 kgs. per cu. metre.
5. Nicaragua	450 lbs.	442 lbs.	27 lbs. per cu. ft.
6. Portuguese East Africa	53 kgs.	51 kgs.	372 kgs. per cu. metre.

(B) BALE COVERING.

Country		Type of Covering	Weight per yard or per metre	Weight per Bale	Yards or Metres per Bale
1. British West Indies—					
(a)	Anguilla ..	..	8 to 9 oz. per yd.	2½ lbs.	Sides : 3 yds. 46 ins. wide. Heads : 2 yds. 27 ins. wide.
(b)	Antigua (1) ..	..	5 oz. per yd.	3 to 4 lbs.	11 yds.
	(2) ..	..	5 oz. per yd.	3 to 4 lbs.	11 yds.
(c)	Montserrat (1) ..	..	{ Various, 1 lb. 1½ lbs. and 2 lbs. } per yd.	8 lbs.	4 yds., but material varies in width
	(2) ..	..		6½ to 8 lbs.	4 yds., but material varies in width
(d)	Nevis ..	..	1 lb. per yd.	6 lbs.	6 yds.
(e)	St. Kitts ..	..	1½ lbs. per yd.	8 lbs.	3 yds. double width
2. Dominican Republic ..					
		Jute, Close Mesh	About 9 oz. peryd.	3 kgs.	11 yds.
3. Iran.. ..					
		Hemp, Pack Cloth	1·3 lbs.	8 lbs.	About 6 yds.
4. Java (1) ..					
	(2) ..	..	0·40 kg. per yd.	3 kgs.	7½ yds.
	(3) ..	..	0·40 kg. per yd.	3 kgs.	7½ yds.
		Gunnies, Close Mesh	—	5·5 kgs. per double bale	In total, 5 gunny bags per double bale
		Jute or Java Mats, Close Mesh	—	—	—
		Covers made out of second-hand bags	—	—	—
5. Nicaragua ..					
		Jute	10 ozs. per yd.	5 lbs.	8 yds.
6. Portuguese East Africa ..					
		Jute	0·35 kg. per m.	0·73 kg.	2·10 metres.

(C) BANDS, TIES, AND WIRES.

Country	No. of Bands or Wires per Bale	Dimensions of Bands or Wires	Total Weight of Bands, Wires on Bale	How Bands or Wires fastened
1. British West Indies—				
(a) Anguilla ..	4 bands	Light $\frac{3}{4}$ in. galvanised iron	About 1 $\frac{1}{4}$ lbs.	Two-piece buckles
(b) Antigua (1) ..	4 bands	1 in. wide	6 lbs.	Buckles
(2) ..	4 bands	$\frac{3}{4}$ in. wide	4 lbs.	Buckles
(c) Montserrat (1) ..	4 bands	10 ft. \times $\frac{3}{4}$ in. wide	6 lbs.	Buckles
(2) ..	5 to 6 bands	13 ft. \times $\frac{3}{4}$ in.	7 lbs.	Buckles
(d) Nevis ..	6 steel bands	10 ft. 10 in. \times $\frac{3}{4}$ in.	6 lbs.	Buckles
(e) St. Kitts ..	6 bands and 6 ties	10 ft. \times $\frac{3}{4}$ in.	8 lbs.	Buckles
2. Dominican Republic ..	6	14 ft. long	1 kg.	Twisted
3. Iran.. ..	8 wires	3-20 m. \times 3-5 mm.	About 4 lbs.	Wires joined by buckles and sometimes twisted
4. Java (1) ..	2 bands	10 ft. \times 1 in. \times $\frac{3}{4}$ in.	1-15 kg.	Buckles
(2) ..	2 bands	10 ft. \times 1 in. \times $\frac{3}{4}$ in.	1-15 kg.	Buckles
(3) ..	4 hoops	10 ft. \times $\frac{3}{4}$ in. \times $\frac{3}{4}$ in.	1-8 kg.	Buckles
5. Nicaragua ..	6 wires	4 ft. in length	3 lbs.	Twisted
6. Portuguese East Africa ..	About 7 bands	2-1 m. in length	1-75 kg.	Mostly by buckles, but also by rivets and by twisting the ends

(D) ADDITIONAL INFORMATION.

Country	Roller or saw ginned	Is bale pressed for export at gin or elsewhere ?	If finally pressed elsewhere, how many interior bales go to make an export bale ?	Range of Staples	Length of staple usually produced	Details of any ginning or export taxes	Exports of last five seasons	
1. British West Indies :								
(a) Anguilla .. —								
		—	—	—	—	—	1936 30,471 lbs. lint 1935 27,570 " " 1934 34,881 " "	1933 18,767 lbs. lint 1932 26,141 " " 1931 32,200 " "
(b) Antigua .. Roller								
		At gin	—	48 to 51 mm.	50 mm.	Export cess levied for con- tribution to W.I.S.I.C.A.	1935 100 Bales 1934 32 " 1933 28 Bales 1932 118 " 1931 424 " "	
(c) Montserrat Roller								
		At gin	—	49 to 53 mm.	50 to 51 mm.	No ginning tax ; export tax of $\frac{1}{4}$ d. per lb. lint ; cess of $\frac{1}{4}$ d. per lb. lint credited to West Ind. Sea Island Cotton Assn. chiefly in respect of advertising.	1935-36 1,143 bales of 400 lbs. 1934-35 2,541 " 1933-34 2,045 " 1932-33 1,120 " 1931-32 468 " "	
(d) Nevis .. Roller								
		At gin	—	1 $\frac{1}{2}$ to 2 $\frac{1}{4}$ ins.	1 $\frac{3}{4}$ ins.	$\frac{1}{4}$ cent. per lb. cess (for the W.I.S.I.C.A.)	1935 72,603 lbs. 1934 47,677 " 1933 10,042 " "	1932 23,737 lbs. 1931 159,000 " "

(e) St. Kitts ..	Roller	At gin	—	2 to 2½ ins.	2 ins.	½ cent. per lb. cess (for the W.I.S.I.C.A.)	1935 101,869 lbs. 1934 59,129 " 1933 20,352 "	1932 35,140 lbs. 1931 129,900 "
2. Dominican Republic	Saw	At gin	—	¾ to 1½ ins.	¾ in.	Usual port dues on cargo for export.		
3. Iran	Saw	At gin	—	Native seed 18 to 27 mm. American seed 22 to 23 mm. (Filestani and Other varieties) 24,25 to 36 mm.	Native seed 22 to 23 mm. American seed 22 to 23 mm. (Filestani and Other varieties) 26,27 to 30,33 mm.	Road taxes when exporting : Rls. 88 per ton or £1 2s. 0d.	1934-35 272,820 bales 1933-34 270,680 " 1932-33 151,300 " 1931-32 298,770 " 1930-31 122,590 "	
4. Java	Saw ginned Hand and machine cleaned	Ginned in-land finally pressed at port of Semarang	Weight varying between 80 to 100 kgs. (1½ bales)	—	About 25 mm.	No taxes	1935 1,458 tons 1934 910 " 1933 943 "	1932 372 tons 1931 945 "
5. Nicaragua	Saw	At gin	—	¾ to 1½ ins.	1½ ins.	No taxes	1935 Abt. 1,056 bales 1934 " 470 " 1933 Nil	1932 Nil 1931 Abt. 560 bales
6. Portuguese East Africa	Almost all saw ginned	The greater part is pressed at the gin	Where cotton is pressed elsewhere, 3 interior bales go to make an export bale	1 to 4 cms.	24 to 25 mm.	No ginning tax ; Export tax is -1% <i>ad valorem</i>	1935 2,807,832 kgs. 1934 1,602,459 " 1933 1,743,583 " 1932 1,134,363 " 1931 1,002,322 "	

WORLD'S COTTON ACRE-
COTON (égrené)—SUPERFICIE, PRODUCTION ET RENDEMENT PAR HA.
Table prepared by The International

COUNTRIES	SUPERFICIE EN MILLIERS D'HECTARES <i>Area in 1,000 hectares</i>						
	1927-28 1931-32	1932-33	1933-34	1934-35	1935-36	1936-37	1937-38
EUROPE							
Bulgaria.. ..	5	8	21	19	36	31	46
Spain	9	8	8	10	25	..	..
Greece	18	20	29	37	45	62	73
Italy	3	1	1	3	4	11	22
Malta	0	0	0	0	0	0	0
Roumania	0	0	2	1	1	1	2
Yugoslavia	1	1	1	1	1	2	3
<i>Totals</i>	36	38	62	71	112	120	160
U.S.S.R. (Territory in Europe and Asia)	1,310	2,172	2,052	1,941	1,954	2,033	2,090
NORTHERN AND CENTRAL AMERICA							
United States (1)	16,005	14,525	11,891	10,872	11,186	12,152	13,731
Guadaloupe	1	0	0	0	0	..	..
Guatemala	0	0	..	0	0	..	..
Haiti (2)	78	101	102	115	121	..	..
British West Indies :							
Antigua	0	0	0	0	0	0	1
Barbados	0	0	0	0	0	0	0
Grenada (2)	2	2	2	2	2	2	2
Montserrat	1	1	1	1	2	2	2
St. Kitts and Nevis	1	0	0	1	1	2	2
St. Vincent : <i>Sea Island</i>	1	0	0	1	1	2	2
" <i>Marie Galante</i>	0	0	0	0	0	0	0
Mexico	164	78	172	169	242	342	336
Nicaragua (2)	—	—	—	—	—	—	—
Puerto Rico	5	..	..	..	0	1	..
Dominican Republic (2)	—	—	—	—	—	—	—
Salvador	—	0	1	1	1	3	3
<i>Totals</i>	16,860	14,710	12,170	11,160	11,560	12,630	14,200
SOUTH AMERICA							
Argentina	114	139	195	286	309	289	419
*Bolivia	2	..	..	..	..	..	..
Brazil	617	731	1,094	1,765	1,968	2,173	2,700
Colombia	(3) 14	14	15	15	23	..	..
Paraguay	11	..	..	..	..	..	..
Peru	126	123	130	149	162	166	170
*Venezuela	—	—	—	—	—	—	—
<i>Totals</i>	880	1,020	1,450	2,240	2,490	2,690	3,350
ASIA							
Burma	128	134	180	185	210	210	213
Ceylon	1	1	1	1	1	1	1
China (4) (5)	1,998	2,279	2,485	2,763	2,152	3,454	4,550
Cyprus	5	3	2	4	6	5	5
Chosen	196	168	175	192	208	227	219
French India	0	0	0	0	0	0	0
India (6)	10,011	8,964	9,588	9,516	10,312	10,019	10,353
Netherlands Indies (2) (7)	8	10	8	11	10	13	..

* Countries for which the figures are not included in the totals.

(1) Production figures do not include linters, which amount to the following quantities, in 1,000 quintals : 2,443 (Average 1927-28 to 1931-32), 1,994 (1932-33), 2,148 (1933-34), 2,190 (1934-35), 2,382 (1935-36) and 3,078 (1936-37). — (2) Export. — (3) Average of three seasons. —

AGE AND PRODUCTION

COTTON (ginned)—AREA, PRODUCTION AND YIELD PER HECTARE

Institute of Agriculture, Rome

COUNTRIES	PRODUCTION EN MILLIERS DE QUINTAUX <i>Production in 1,000 quintals</i>						
	1927-28 1931-32	1932-33	1933-34	1934-35	1935-36	1936-37	1937-38
EUROPE							
Bulgaria	8	13	24	39	84	64	89
Spain	9	11	9	19	26	..	..
Greece	31	48	69	78	106	126	167
Italy	7	2	3	9	8	21	42
Malta	1	0	0	0	0	0	0
Roumania	0	1	1	1	1	3	5
Yugoslavia	1	1	1	2	2	4	7
<i>Totals</i>	57	76	107	148	227	230	320
U.S.S.R. (Territory in Europe and Asia)	2,981	4,029	4,078	3,634	5,307	7,781	8,190
NORTHERN AND CENTRAL AMERICA							
United States (1)	31,770	28,189	28,289	20,894	23,066	26,883	41,052
Guadaloupe	0	0	0	0	0	..	..
Guatemala	0	0	..	0	0	..	..
Haiti (2)	50	58	53	62	58	54	..
British West Indies :							
Antigua	0	0	0	0	1	0	1
Barbados	0	0	0	0	0	0	0
Grenada (2)	1	2	1	2	1	1	1
Montserrat	3	1	2	4	5	2	3
St. Kitts and Nevis	2	0	1	1	2	2	3
St. Vincent : <i>Sea Island</i>	2	0	0	1	2	2	2
" <i>Marie Galante</i>	0	0	0	0	0	0	0
Mexico	473	220	565	483	543	857	737
Nicaragua (2)	1	..	1	2	5	..	..
Puerto Rico	5	..	..	..	0	1	..
Dominican Republic (2)	0	0	0	..	0	0	..
Salvador	0	0	1	5	9	14	14
<i>Totals</i>	32,320	28,470	28,910	21,450	23,690	27,820	41,880
SOUTH AMERICA							
Argentina	300	325	434	640	810	312	610
*Bolivia	5	..	..	..	..	..	..
Brazil	1,115	987	2,165	3,019	3,751	4,000	4,780
Colombia	(3) 25	33	34	30	47	..	..
Paraguay	31	..	..	..	90	..	..
Peru	554	526	602	741	852	836	919
*Venezuela	74	..	..	..	..	..	..
<i>Totals</i>	2,020	1,910	3,270	4,500	5,500	5,300	6,470
ASIA							
Burma	113	116	185	169	191	205	297
Ceylon	0	0	0	0	0	0	..
China (4) (5)	4,638	4,902	5,911	6,775	4,925	8,486	7,000
Cyprus	6	2	2	3	9	5	8
Chosen	288	208	299	295	407	453	461
French India	1	1	1	1	1	1	..
India (6)	9,402	8,333	9,083	8,644	10,574	11,256	10,275
Netherlands Indies (2) (7)	10	6	12	11	21	13	..

(5) Estimates of the Chinese Cotton Statistics Association, established by the Chinese Cotton Millowners' Association, Shanghai. — (6) Not including Burma. — (7) Area figures refer only to Jarva and Madura. For the other islands, figures are lacking.

**WORLD'S COTTON ACRE-
COTON (égrené)—SUPERFICIE, PRODUCTION ET RENDEMENT PAR HA.**

COUNTRIES	SUPERFICIE EN MILLIERS D'HECTARES <i>Area in 1,000 hectares</i>						
	1927-28 1931-32	1932-33	1933-34	1934-35	1935-36	1936-37	1937-38
ASIA							
Indochina : Annam	7	8	8	8	7	7	..
" Cambodia	7	5	5	5	5	5	..
" Cochinchina	0	0	0	0	0	0	..
" Laos	1	3	1	1	1	1	..
" Tonkin	1	1	1	1	1	1	..
Iraq .. ..	..	..	..	..	..	11	26
Iran	(1) 60	53	120	96	76	137	..
Japan	1	1	1	1	2	1	..
Philippines	0	1	1	1	2	..	..
Siam	3	3	3	4	5	7	..
Syria and Lebanon	20	10	8	13	33	40	35
Turkey	165	145	162	197	211	254	317
Totals	12,610	11,780	12,750	13,000	13,250	14,390	15,910
AFRICA							
French Equat. Africa	14	63	85	117	125	..	..
French West Africa (2) .. ..	..	..	..	..	..	..	..
Italian East Africa :	..	..	..	..	..	..	..
Eritrea	3	2	5	5	..	8	..
Somalia (3)	7	5	4	5	5	..	..
Algeria	4	0	0	..	0	0	0
Angola	4	3	6	6	10	8	..
Cameroun (Fr. mand.)	1	1	1	1	1	1	..
Belgian Congo	126	191	218	268	304	345	..
Egypt	745	459	758	728	701	721	831
Kenya .. ..	..	..	..	..	..	..	..
Madagascar	0	0	0	0	..	..	..
French Morocco	0	0	0	0	..	..	..
Mozambique : Province	(4) 14	..	..	..	..	..	..
" Comp. Terr. (5)	9	1	2	1	2	..	..
Nigeria .. ..	..	..	..	..	..	..	..
Nyasaland : Europ. plant	0	0	0	1	1	1	30
" Native plant	11	14	12	16	29	36	..
Uganda (6)	283	434	441	480	553	601	703
Southern Rhodesia	2	1	1	2	1	1	..
Northern Rhodesia	0	0	0	..	..	..	..
Ruanda-Urundi	(4) 1	2	3	3	3	3	..
Anglo-Egyptian Sudan	142	133	135	148	159	192	179
Tanganyika .. ..	..	..	..	..	..	..	..
Togo (Fr. mand.) (6) .. ..	..	..	20	23	23	..	..
Union of South Africa (7)	15	..	..	..	..	..	..
Totals	1,710	1,600	2,070	2,360	2,640	2,840	3,090
OCEANIA							
Australia (Queensland)	9	28	18	22	24	22	..
Fiji Islands	0	0	0	0	0	0	..
New Caledonia	0	0	..	..	0	0	..
New Hebrides (6) .. ..	..	..	..	0	0	..	..
Totals	9	28	18	22	24	24	..
General Totals							
Excluding the U.S.S.R.	32,100	29,180	28,520	28,850	30,080	32,690	36,740
Including the U.S.S.R.	33,410	31,350	30,570	30,790	32,030	34,720	38,830

(1) Season 1931-32. — (2) Quantities bought for export (Statistics of Ivory Coast, French Sudan and Dahomey). — (3) Irrigated crops only. — (4) Average of three seasons. — (5) Cultivation by Europeans only. — (6) Exports. — (7) Including Swaziland.

AGE AND PRODUCTION

COTTON (ginned)—AREA, PRODUCTION AND YIELD PER HECTARE

COUNTRIES	PRODUCTION EN MILLIERS DE QUINTAUX <i>Production in 1,000 quintals</i>						
	1927-28 1931-32	1932-33	1933-34	1934-35	1935-36	1936-37	1937-38
ASIA							
Indochina : Annam	6	7	6	6	6	7	..
" Cambodia	5	5	5	5	4	5	..
" Cochinchina	0	0	0	0	0	0	..
" Laos	1	2	1	1	1	0	..
" Tonkin	2	2	1	1	1	1	..
Iraq	6	1	1	4	8	17	45
Iran	(1) 229	155	312	278	255	372	..
Japan	2	1	2	1	1	2	..
Philippines	1	2	2	2	5	..	..
Siam	7	5	6	9	13	16	..
Syria and Lebanon	25	11	9	26	58	68	56
Turkey	188	204	278	378	522	625	600
Totals	14,930	14,040	16,120	16,610	17,000	21,540	19,180
AFRICA							
French Equat. Africa	7	28	45	54	71	..	..
French West Africa (2)	28	16	24	36	37	..	..
Italian East Africa :							
Eritrea	3	2	2	3	..	3	..
Somalia (3)	10	9	7	7	6	3	..
Algeria	10	0	0	—	0	1	1
Angola	6	4	6	6	10	7	..
Cameroun (Fr. mand.)	1	0	1	1	1	1	..
Belgian Congo	86	139	173	228	269	315	..
Egypt	3,353	2,227	3,853	3,394	3,835	4,092	4,047
Kenya	3	6	12	16	29	42	42
Madagascar	1	0	0	0	—	—	—
French Morocco	1	..	0	0	..	..	..
Mozambique : Province	(4) 18	..	..	..	..	..	..
Comp. Terr. (5)	6	1	2	1	2	..	..
Nigeria	44	42	47	101	106	89	..
Nyasaland : Europ. plant	0	0	0	1	1	1	..
Native plant	9	8	9	16	30	19	18
Uganda (6)	315	535	518	459	583	614	628
Southern Rhodesia	2	1	1	1	1	1	..
Northern Rhodesia	0	0	0	—	—	—	..
Ruanda-Urundi	1	3	5	5	5	6	..
Anglo-Egyptian Sudan	298	251	286	404	450	604	557
Tanganyika	40	33	56	71	108	115	(8) 117
Togo (Fr. mand.) (8)	16	10	11	15	15	..	..
Union of South Africa (7)	17	3	4	5	4	7	..
Totals	4,270	3,340	5,090	4,940	5,580	6,070	6,940
OCEANIA							
Australia (Queensland)	18	27	41	32	30	19	..
Fiji Islands	1	0	0	0	0	0	..
New Caledonia	1	0	—	—	0	0	..
New Hebrides (6)	4	1	0	0	0	..	..
Totals	24	28	41	32	31	20	..
General Totals :							
Excluding the U.S.S.R.	53,600	47,900	53,500	47,700	52,100	61,000	74,800
Including the U.S.S.R.	56,600	51,900	57,600	51,300	57,400	68,800	83,000

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OFFICIAL ACREAGE REPORT, 1938

The first report issued on July 8 by the Washington Department of Agriculture on the cotton acreage under cultivation on July 1 indicates a decrease of 22 per cent. on the area planted last year. The total is returned at 26,904,000 acres, comparing with 34,471,000 acres planted last year, 30,960,000 acres in 1936, and 27,888,000 acres in 1935. Lower California is estimated to have 94,000 acres under cotton against 140,000 acres last year, but this is not included in the United States total.

The following are the acreage details (in thousands) :—

	1938	1937	1936	1935
Virginia	44	67	54	53
North Carolina	911	1,111	973	939
South Carolina	1,313	1,705	1,416	1,369
Georgia	2,121	2,674	2,299	2,172
Florida	90	120	90	91
Missouri	398	569	414	308
Tennessee	816	995	837	743
Alabama	2,191	2,705	2,335	2,252
Mississippi	2,726	3,495	3,010	2,665
Louisiana	1,244	1,575	1,409	1,231
Texas	9,960	12,769	12,080	10,964
Oklahoma	1,903	2,471	2,558	2,427
Arkansas	2,479	3,000	2,764	2,178
New Mexico	115	162	118	94
Arizona	212	299	208	160
California	356	624	370	220
Other States	25	31	25	22
Total	26,904	34,471	30,960	27,888

The Washington Department of Agriculture, in a supplementary report, says that this year's cotton acreage is the smallest since 1900. Among the causes of the sharp reduction are the agricultural adjustment programme, the relatively low prices received for last year's crop, and the difficulties in securing stands because of unfavourable weather.

Decreases are shown in all states. The greatest reduction occurs West of the Mississippi River. In this group California shows the heaviest decrease with acreage estimate at 57 per cent. of 1937. Missouri follows with 70 per cent. ; Arizona and New Mexico, 71 per cent. ; Oklahoma, 77 per cent. ; Texas, 78 per cent. , and Louisiana and Arkansas, 79 and 80 per cent. respectively.

East of the Mississippi River, where the decreases are not so marked, the 1938 acreage in Tennessee and North Carolina is estimated at 82 per cent. of the acreage in 1937, followed by Alabama with 81 per cent., Georgia with 79 per cent., Mississippi 78 per cent., South Carolina 77 per cent., and Florida and Virginia with 75 and 65 per cent. respectively.

Sea Island and American-Egyptian cotton, which are not affected by the Agricultural adjustment programme, show large increases in 1938 over 1937. The acreage of Sea Island cotton is estimated at 27,000 acres in 1938 compared with 19,900 in 1937, and American-Egyptian at 41,000 against 21,000.

FINAL U.S. COTTON REPORT ON 1937 CROP

The Crop Reporting Board of the Bureau of Agricultural Economics, from the reports and data furnished by crop correspondents, field statisticians, co-operating State agencies, and Census reported ginnings makes the following revised estimates of the Cotton Crop of 1937.

STATE	Area in cultivation 1st July Acres (in 1,000's)	Area Picked Acres (in 1,000's)	Yield of Lint Cotton Picked per Acre (in lbs.)	Production <i>a</i> Bales 500 lbs. (gross) (in 1000's)		Ginnings, as reported by Census, Bales 500 lbs. (gross) 1937 Crop
	1937	1937	1937	1937	1937	1937
Missouri	569	558	346	404	308	395,458
Virginia	67	66	312	43	33	40,307
North Carolina ..	1,111	1,103	338	780	597	780,922
South Carolina ..	1,705	1,695	289	1,023	816	1,022,340
Georgia	2,674	2,661	270	1,500	1,086	1,506,547
Florida	120	118	162	40	31	34,605
Tennessee	995	989	320	661	433	660,005
Alabama	2,705	2,694	290	1,631	1,145	1,635,776
Mississippi	3,495	3,467	372	2,692	1,911	2,689,915
Arkansas	3,099	3,062	298	1,904	1,295	1,914,557
Louisiana	1,575	1,569	337	1,104	761	1,103,829
Oklahoma	2,471	2,372	156	773	290	762,970
Texas	12,769	12,539	197	5,154	2,933	5,158,412
New Mexico	162	159	490	163	111	155,769
Arizona	299	(b) 299	(b) 501	(b) 313	191	312,501
California	624	620	570	738	442	741,582
All other	31	30	361	23	16	18,658
U.S. Total	34,471	34,001	266.9	18,946	12,399	18,934,153
Ga. Sea Island (b)	4.1	3.8	90	.7	(c)	—
Fla. Sea Island (b)	15.8	15.4	77	2.5	.6	—
Ariz. Egyptian (b)	21	21	269	12	18	—
(d) Lower California (Old Mexico) ..	140	140	179	52	61	—

(a) Bales rounded to thousands, allowances made for interstate movement of seed cotton for ginning and added for U.S. total. Not including production of linters. (b) Included in State and United States totals. (c) 70 bales. (d) Not included in California figures, nor in United States total.

ACREAGE ALLOTMENT TRANSFERS

The U.S. House of Representatives voted recently to permit the transfer by cotton growers to other growers of unused portions of their acreage allotments. This measure had already passed the Senate. The principal effect of the change in allotments of cotton acreage will be felt in the North-western Belt. In Oklahoma approximately 400,000 acres of "frozen" cotton acreage existed. Cotton acreage had been allotted to wheat farmers who had no acreage available to plant cotton. The change in the new farm programme will permit the wheat farmers to transfer their cotton acreage allotments to farmers who have available land for cotton planting, thus bringing up the State's total cotton acreage to the original allotment.

COTTON AND TRADE AGREEMENTS

The following is extracted from a recent issue of the *New York Journal of Commerce* :—

Assistant Secretary of State, Francis B. Sayre, in a recent address described the efforts that the Administration has made to expand American foreign trade through the negotiation of seventeen reciprocal trade agreements. He promised that this effort would be pushed further, but he ruled out proposals to stimulate exports through bounties that would raise the charge of dumping in foreign markets.

Since cotton constitutes our largest single export, it would be supposed that the South would take the leadership in supporting this programme for enlargement of American foreign trade. However, the trend of exports of raw cotton has not been such as to arouse any enthusiasm for the Administration's foreign trade programme in the cotton belt. Total cotton exports from the United States during the crop year ending July 31 will aggregate some 5,650,000 bales, which compares with 5,511,000 bales exported the year before and 8,575,000 bales shipped abroad in the five years ended 1929.

The fact of the matter is, of course, that whatever benefit to our cotton exports results from the reciprocal trade programme is more than offset by the policy of pegging the price of cotton through Government loans that is being pursued simultaneously. American exporters of cotton have been placed in a relatively disadvantageous position as compared with several competing cotton growing countries.

The one sure way of increasing American cotton exports is to meet competition of cotton from other countries in the world markets without price restriction. Such free competition must be maintained, regardless of whether or not the Administration wants to give the American cotton grower a subsidy for political or other reasons. Under the Agricultural Adjustment Act of 1938, however, Government loans to cotton growers are provided as a permanent arrangement under stated circumstances.

The outlook for cotton exports remains clouded, therefore, regardless of how successful the general programme of stimulating foreign trade through reciprocal trade treaties proves to be.

POSSIBILITY OF LOAN RATE DIFFERENTIALS ON NEW CROP

The New York Cotton Exchange Service states that it is believed by many who have studied the new law that if a Government loan on the 1938 cotton crop becomes mandatory under the Agricultural Adjustment Act of 1938, there may be loan rate differentials for the various grades and the various staples of cotton, resulting in the establishment of rates higher than the basic rate for grades and staples above the standard quality and rates lower than the basic rate for grades and staples below the standard quality. In other words, it is thought probable that, if a mandatory loan is made, there will be a basic loan rate for a standard quality of cotton, presumably middling seven-eighths inch, which basic loan rate must not be less than 52 per cent. and not more than 75 per cent. of the cotton parity price on August 1, and there will be a different loan rate for each other grade and staple of cotton.

This expectation in various trade quarters is based upon a paragraph in the new law, which deals with the rates that may be established in the case of a mandatory loan. This paragraph reads as follows :—

“ The rates of loans . . . on wheat, cotton, and corn not of standard grade, type, staple, or quality shall be increased or decreased in relation to the rates above provided by such amounts as the secretary prescribes as properly reflecting differences from standard in grade, type, staple, and quality.”

U.S. COTTON STOCKS

We extract the following from a recent issue of the *Cotton Digest* :—

A cursory study of comparative figures is very interesting. The stocks of American cotton in the United States on April 30, according to the New York Cotton Exchange Service, totalled 13,271,000 running bales. This compares with 6,819,000 bales a year earlier, when stocks were only a little more than half this amount, and with 7,762,000 bales two years earlier. On the other hand, stocks of American cotton abroad on April 30, 1938, totalled 2,689,000 running bales. This compared with 2,524,000 bales a year earlier and 2,336,000 bales two years earlier. Thus it becomes evident that in spite of the large American crop and the relatively low price, the amount of American cotton which has gone abroad and into storage is virtually no larger than when the price was substantially higher.

Nor is it because of any increase in the consumption of American cotton abroad. Total consumption of American cotton from August 1 to April 30 amounted to 8,549,000 running bales, and domestic consumption in the same period amounted to 4,438,159 running bales. During

the same period in the preceding season world consumption of American cotton totalled 9,858,000 running bales and domestic consumption totalled 6,016,882 running bales.

Taking another viewpoint of the statistical situation in this direction, the total world stock of American cotton on April 30, 1938, totalled 15,960,000 bales, compared with 9,343,000 bales a year earlier.

This of course was due to the very large American crop, but let us see where this cotton is held. A total of 1,170,000 running bales was held on farms on April 30, 1938, compared with 699,000 bales a year earlier. But the stock in warehouses in the United States totalled another 10,444,000 running bales, compared with 4,187,000 running bales a year earlier.

Compared with this are the stocks of cotton afloat to and at Europe which amounted to 1,611,000 running bales against 1,086,000 bales a year earlier, and afloat to and at the Orient totalling 254,000 bales compared with 605,000 bales a year earlier. In other words, the total amount of world stocks of American cotton afloat to and abroad on April 30 amounted to 1,865,000 bales against 1,691,000 bales a year earlier.

Likewise the stocks held by mills show a similar trend. Stocks at domestic mills on April 30 totalled 1,657,000 bales against 1,933,000 bales a year earlier and at mills abroad 824,000 bales against 833,000 bales a year ago or a total of 2,481,000 bales of American cotton held at all mills in the world compared with 2,766,000 bales a year ago.

The very large stocks of American cotton held in warehouses in the United States are the direct result of our government policies of price fixing loans and high tariff walls.

The point is that it makes very little difference whether the Bankhead Bill is passed or not because when the 1938 cotton crop begins to move in volume there will not be sufficient storage space available with which to house the crop whether reconcentration is permitted at the discretion of the Commodity Credit Corporation in accordance with the terms of the producer-borrower note. There will be a wild scramble for storage space, whenever and wherever it is available, and the clause in the Bill, which was inserted by Congressman Marvin Jones to the effect that the cotton may be moved under certain conditions makes the Bill so innocuous as to make its passage unimportant.

The new crop is now making satisfactory progress. Of the private estimates which have been thus far issued, varying widely as usual, one can glean the idea that the crop may possibly total as much as 12,000,000 bales, but even should it fall far under that figure storage space will be far short of requirements, and some drastic measures will be necessary to prevent a vast weather damage to the crop after it is picked and ginned.

It would seem to be the better part of wisdom for such men as Congressman Bankhead to look into the actual situation before sponsoring a Bill which will attempt to bind the Government loan cotton to its present location until it is actually sold into consumption.

That another loan upon the 1938 cotton crop will be mandatory seems probable, with the average price at the ten-designated spot markets currently below the level which would require the loan. Such being the

case, there seems no reason why producers should sell their cotton in the open market at a price under that which they can obtain for it by the mere process of filling out a loan application, even though the producer considers his cotton sold, in spite of the views of those who are guiding the cotton producers into the greatest chaos of all time.

U.S. NATIONAL COTTON COUNCIL

The National Cotton Council was brought into being in Cleveland, Miss., on June 15 last, following a meeting of a thousand leaders of the cotton industry in the Southern States. The Council was designated to put cotton production and cotton commerce on an equal footing with other industries.

The Council will campaign to :—

Find proper and greater markets for cotton.

Maintain proper research activities for new uses for the staple.

Obtain proper legislation.

Advertise extensively the known uses of cotton.

Increase foreign cotton shipments.

Unanimously chosen to head the new organisation was Mr. Oscar Johnston of Scott, Miss., planter and prominent figure in national cotton circles. Votes electing him came from cotton farmers, shippers, ginner, seed crushers, warehousemen and those interested in every phase of handling the South's staple commerce.

Seven cotton-producing States were represented at the meeting, sponsored by the Delta Council. They were Mississippi, Tennessee, Arkansas, Oklahoma, Louisiana, Alabama, Texas and New Mexico.

U.S. TARIFFS AND THE COTTON TRADE

Mr. C. T. Revere, the well-known authority on cotton and a partner in the New York Cotton brokerage firm of Munds, Winslow & Potter, recently stated to the Press that American tariff barriers must be lowered if the American cotton industry is to be saved.

He proposed a three-point plan to dispose of the huge cotton surplus of more than 13,000,000 bales held by U.S.A. and to regain for the United States her former dominant position in the world cotton market. It embraced :—

Downward tariff revision, to stimulate world trade ; improvement of the quality of American cotton, at the same time reducing production costs ; expansion of domestic uses for cotton, including hundreds of thousands of miles of " cotton roads."

The American cotton crop for the 1937-38 season totalled 18,000,000 bales ; the carryover from the previous season was 6,000,000 bales. The crop now growing will add 12,000,000 bales.

Brazil, India, Egypt and other foreign countries combined are producing more cotton than the United States, with their production



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mounting yearly. And the total world consumption of cotton for the 1937-38 season, according to Mr. Revere and other authorities, will not greatly exceed 11,000,000 bales of American cotton.

"In my opinion there is no doctrinal solution of our cotton problem," Mr. Revere said. "I see nothing in a centrally directed, planned economy, presided over by well-intentioned theorists whose proposed methods are utterly in conflict with historical experience.

"There are two sound approaches to our problem. One is international in scope and the other is intertwined with our domestic economy. I seriously doubt if a purely internal approach on a basis of self-contained domestic economy would be adequate to deal with our difficulties. I do not believe that a restriction of production kept within the limits of domestic consumption would lead to anything but serious dislocation of the agricultural economy of the entire United States.

"We have developed a cotton economy and a productive capacity far beyond the limits of domestic consumption. The mere discarding of the acreage necessary to a nationalistic operation would throw millions out of employment, not only in the cultivation of cotton but also in the handling, transportation and distribution of this commodity.

"Therefore I am firmly convinced that a revision of our tariff structure, reducing our import barriers, is essential not only for the retention of our export outlets but also for their expansion. As a result of our high tariff walls, we have virtually refused to accept goods in payment for cotton and other staple products. We are draining countries of gold which we no longer need and which is essential to the currency and economic stability of the countries sending the yellow metal here.

"As a result of our tariff policy, and of impounding our surplus supplies under Government loans, we are losing, and one might almost say practically have lost our foreign markets for cotton.

"We have encouraged a competition abroad that will be extremely difficult to meet and overcome. Yet, although it may be a long and bitter struggle, it is possible for us to regain a large measure of the supremacy we virtually abandoned."

"The first step naturally will come from a more co-operative international spirit. In addition to this, we must not only strive continually to improve the character of our cotton, restoring it once more to the preference it always has enjoyed among the spinners of the world, but furthermore we must reduce our production costs and be able to meet world price competition in all markets.

"This is the international aspect of our problem. In addition to this we should keep in mind always that the possibilities for the expansion of cotton consumption within our own borders never have been fully visualised or exploited.

"Here we are, a nation with one-seventh of the civilised world's population and nevertheless possessing a buying power practically equal to the rest of the world combined. Henry Ford once said that in the development of new uses for cotton the surface thus far has hardly been scratched. I think Henry Ford was right.

"My pet hobby, if I may call it such, is the expansion of the use of

cotton membrane fabric in the building of bituminous surfaced roads. Road building projects undertaken under the supervision of the Cotton Textile Institute and constructed in strict accordance with the technique devised by the institute have demonstrated clearly the advantages of this development. The original cost is not more than one-third of concrete construction and their durability has been tested over as much as twelve years."

LINT DAMAGED BY MACHINE PICKER

The greatest difficulty to be overcome in the development of a satisfactory mechanical cotton picker is the failure to harvest existing varieties of high quality seed cotton without serious damage to the lint. This is the conclusion of Charles A. Bennett, of the U.S. Bureau of Agricultural Engineering, who addressed the 32nd annual meeting of the American Society of Agricultural Engineers at Asilomar, Pacific Grove, Calif., on June 29 last.

Spinning tests of cotton harvested with the newest type of mechanical pickers, show that "even with the use of full batteries of gin cleaners and extractors, the machine-picked cotton was of appreciably lower grade and yielded much more manufacturing waste than hand-picked cotton from the same field."

Machine-picked cotton, he said, is matted, carries much green leaf and occasionally has green stains on the fibre, it contains fragments of bark, stems and long grasses.

From the standpoint of picking the cotton, Mr. Bennett said, the spindle-type mechanical pickers do a fairly good job as they gather about 90 per cent. of the open cotton and only from 3 to 8 per cent. is knocked to the ground.

He summarised the objectives of mechanical harvesting as follows :

- (1) To replace entirely manual harvesting by mechanical methods, or
- (2) To supplement manual labour continuously during the cotton picking season, or
- (3) To clean up all late-season portions of open cotton remaining after defoliation of the cotton plants.

The production of high-grade mechanically-harvested cotton, Mr. Bennett said, probably will be difficult until the plant breeder has developed cottons of suitable pickability. In his opinion the problem is threefold, its solution lying within the domains of plant breeding, agricultural engineering and cotton ginning.

(U.S. Dept. of Agriculture)

ONE-VARIETY COTTON PRODUCTION

By C. B. DOYLE

Principal Agronomist, Cotton Division, Bureau of Plant Industry, U.S.D.A.

(Extract of an article which appeared in Acco Press for May)

At the end of 1937, there had been established in the United States, 814 one-variety cotton community organisations, distributed in 343 of the approximately 850 cotton producing counties, in the 14 principal cotton states. The total planted area was 2,434,367 acres, and the total production was 1,863,692 bales of quality cotton with premium $\frac{1}{8}$ to $1\frac{1}{8}$ in. staple. Thirty-five of these community developments were county wide, the largest being in California where 150,000 or more bales of one-variety cotton were produced in each of three counties the past season. In the main cotton belt were several county-wide organisations that produced up to 20,000 or more bales of one-variety cotton. The table shows, by States, the progress that has been made in one-variety standardisation in the United States during the past three years.

While the cotton in some of the one-variety areas was stapled at slightly less than 1 in., the great bulk of it was even-running, 1 and $1\frac{1}{2}$ in. staple. This increase in production of the better lengths of staple in the one-variety communities is reflected in the Grade and Staple Reports published by the Bureau of Agricultural Economics. In 1928, only 11 per cent. of the United States crop was 1 and $1\frac{1}{2}$ in. staple, whereas, the proportion of these lengths had increased by 1936 to 23 per cent. of the crop. In 1937, the percentage fell slightly to 20 per cent., but there was a more than compensating increase in the production of $\frac{15}{16}$ and $\frac{3}{32}$ in. staple from 22 per cent. in 1936 to 28 per cent. in 1937.

In Georgia, which is one of the leading States in one-variety standardisation, the increase in production of 1 and $1\frac{1}{2}$ in. staple was much more pronounced. Only 3 per cent. of the State crop was of these lengths in 1928, whereas, in 1936, this had increased to 30 per cent. In 1937, the proportion fell to 24 per cent., but here again there was a compensating increase in $\frac{15}{16}$ and $\frac{3}{32}$ in. staple, from 24 per cent. in 1936 to 34 per cent. in 1937.

In Mississippi, another State where organised cotton improvement has gone rapidly forward, only 9 per cent. of the State crop had 1 and $1\frac{1}{2}$ in. staple in 1928, but by 1936 this had increased to 25 per cent., and in 1937 to 33 per cent. In this State also there was an increase in the proportion of $\frac{15}{16}$ and $\frac{3}{32}$ in. staple, from 11 per cent. in 1936 to 22 per cent. in 1937.

The most outstanding example of staple improvement resulting from one-variety standardisation is shown in Grade and Staple District No. 3 in Mississippi, the so-called hill section of the Eastern part of the State. Prior to 1931, the great bulk of the cotton from that district, amounting to about a half million bales annually, was of very short staple. In 1928, only 3 per cent. of the crop was reported as 1 and $1\frac{1}{2}$ in. staple, whereas, by 1936, this had increased to 37 per cent. A slight falling off to 35 per cent. occurred in 1937, but here again there was a substantial increase in the production of $\frac{15}{16}$ and $\frac{3}{32}$ in. staple, from 22 per cent. in 1936 to 38

per cent. in 1937. At the same time this improvement was taking place, the production of staple of less than $\frac{7}{8}$ in. declined from 50 per cent. in 1928 to 11 per cent. in 1936. In 1937 only 6 per cent. of the total crop of 762,000 bales produced in that district was below $\frac{7}{8}$ in. and only 21 per cent. was less than $\frac{11}{16}$ in.

In contrast with these figures, reports for Texas and Oklahoma for the same periods are of interest. In Texas, 12 per cent. of the State crop was 1 and $1\frac{1}{32}$ in. staple in 1928, whereas, in 1936, this had fallen to 8 per cent., and in 1937 to only 4 per cent. In Oklahoma, 15 per cent. of the State crop was 1 and $1\frac{1}{32}$ in. staple in 1928, but by 1936, this had fallen to 3 per cent. In 1937, Oklahoma showed a slight increase to 5 per cent. of 1 and $1\frac{1}{32}$ in. cotton.

In the case of Texas, it is of interest to note also that the production of $\frac{11}{16}$ and $\frac{3}{4}$ in. staple declined from 32 per cent. in 1928 to 27 per cent. in 1936, and to only 25 per cent. of the bumper crop of 1937. Of the total crop of 4,947,000 bales produced in Texas in 1937, about 50 per cent. or 2,473,500 bales were only $\frac{7}{8}$ and $\frac{3}{4}$ in. staple, and 19 per cent. or 927,000 bales were shorter than $\frac{7}{8}$ in.

In Oklahoma, the production of $\frac{11}{16}$ and $\frac{3}{4}$ in. cotton declined from 33 per cent. in 1928 to 14 per cent. in 1936. In 1937, the proportion of $\frac{11}{16}$ and $\frac{3}{4}$ in. cotton increased to 23 per cent., but because of the much larger State crop, the actual bale production of these lengths was more than four times greater than in 1936. As in Texas, 50 per cent. of the total 1937 Oklahoma crop had only $\frac{7}{8}$ and $\frac{3}{4}$ in. staple, with 22 per cent. shorter than $\frac{7}{8}$ in.

Special attention is drawn here to the staple situation in Texas and Oklahoma because about 90 per cent. of the Texas crop and 75 per cent. of the Oklahoma production has been exported annually to foreign mills. As a result of the decline in production of good, hard-bodied, $\frac{11}{16}$ to $1\frac{1}{16}$ in. staple for which Texas and Oklahoma have been famous the world over, it is reported that orders from foreign mills can not be filled and permanent loss of these markets is threatened. With cotton our most valuable export crop and about half of this export business supplied with cotton from Texas and Oklahoma, the importance and immediate need of permanent improvements in the quality of the cotton of those States can be appreciated.

There is no doubt that drought and other adverse seasonal conditions in Texas and Oklahoma have been major factors in the decline of staple quality in those States, but much of it is the result of continued widespread planting of varieties with very short staple, and of those varieties producing the marginal lengths of $\frac{7}{8}$ and $\frac{3}{4}$ in. staple which, in the dry years, usually fall into the very short class. The proportions of the different lengths of staple up to $1\frac{1}{16}$ and $1\frac{1}{32}$ ins. produced in the United States, and in the States referred to in the foregoing paragraphs, are charted below.

For several years the Bureau of Plant Industry has co-operated with the State Institutions in Texas and Oklahoma, to encourage cotton improvement in one-variety communities, and by this time it was confidently expected that substantial progress would be shown, especially in Texas. Unfortunately, however, floods and other adverse seasonal con-

ditions, have destroyed thousands of bushels of pure planting seed of the improved varieties that were being increased on the farms of breeders, and in the increase fields of the one-variety seed communities that have been organised. However, the situation in both of these States with respect to planting seed for one-variety production is much more promising at this time, and there is excellent prospect that the next two or three years will see substantial improvement in the quality of Texas and Oklahoma cotton.

The author then gives an example of the increased profit to the farmers by cultivating an improved variety in larger running lots. He states that very careful records were kept of the members and non-members. There were two gins, the farmers cultivating less than half of the cotton acreage of this community plant, one variety of cotton, stapling better than an inch, and gin this and no other cotton on one gin, marketing their cotton as nearly as possible in fifty-bale lots. The non-member farmers gin their cotton of mixed varieties on the other gin. Very careful records were obtained in regard to the acreage of both non-members and members cotton their sales, etc., with the result very much in favour of the one variety cotton as shown in the next paragraph.

AVERAGE YIELD PER ACRE OF ONE-VARIETY COMMUNITY COTTON VERSUS MIXED VARIETIES.

The average yield per acre of the one-variety community cotton was found to be 216.3 lbs. and that of the mixed varieties 150.6, an increase of 65.7 lbs. per acre over that of the mixed varieties.

PROSPECTS FOR 1938 AND FUTURE OUTLOOK.

From the results accomplished thus far, there is no doubt that the practicability of the plan of one-variety cotton production for general adoption in the United States, has been demonstrated. The principal concern at this time, therefore, is not the question of the practicability of the plan, but the much more important need of recognising and putting into effect all those procedures that are necessary to preserve that which has been accomplished, and to pave the way for constructive and continued progress along sound lines in the years to come.

From the preliminary reports, it now appears that, with the new one-variety communities recently organised, the total number operating in 1938 will exceed 1,000 and production may exceed 2,500,000 bales. Since the one-variety organisations are set up under practically every type of soil and season across the entire belt, it would be possible, using these as production centres in the different regions, to completely change the staple picture in the United States within the next three years.

In order to do this, however, it is essential that there be constructive interest and co-operation from every branch of the cotton industry. Ginners, oil millers, merchants, bankers, chambers of commerce, buying firms, shippers' associations and agricultural leaders throughout the South, must recognise what this improvement programme means to them as well as the farmer, and get behind the movement. American farmers are not going to be interested in producing better cotton just for the love of it. Unless they receive a better price for good cotton they are not

ONE-VARIETY COTTON PRODUCTION

By States

	1935			1936			1937		
	Counties	Communi- ties	Produc- tion Acreage	Counties	Communi- ties	Produc- tion Acreage	Counties	Communi- ties	Produc- tion Acreage
Alabama ..	16	21	10,000	31	74	40,000	37	89	55,000
Arizona ..	5	11	59,700	5	13	93,850	5	13	120,000
Arkansas ..	..	..	.....	26	74	210,160	30	88	212,672
California ..	9	9	205,430	8	8	347,800	8	8	389,000
Florida* ..	3	3	716	5	5	4,043	8	8	19,061
Georgia ..	55	124	161,280	61	137	217,206	74	162	303,505
Louisiana ..	..	..	.....	5	5	75,000	1 (Par)	25	100,000
Mississippi ..	46	110	124,409	48	126	193,064	49	160	251,735
New Mexico ..	5	7	90,000	5	7	116,000	5	7	144,000
North Carolina..	6	10	21,100	7	13	34,000	7	13	39,000
Oklahoma ..	7	12	46,500	8	10	14,210	7	9	9,623
South Carolina ..	3	5	18,000	6	8	66,500	6	8	82,500
Tennessee ..	..	..	.....	..	..	.....	20	68	111,920
Texas.. ..	7	31	78,000	10	32	150,000	86	156	396,351
Total ..	162	343	815,035	225	512	1,561,833	343	814	2,434,367
			583,413			1,157,227			1,863,692

* Sea Island.

going to grow it. It is up to the trade, therefore, to adjust the system of buying so that premiums for good cotton and commensurate discounts for poor cotton are reflected back to the grower.

One of the difficulties encountered with the cotton from the one-variety communities has been to keep it from getting scattered and losing its identity by being marketed with cotton from other districts. Much time and expense of classing, sorting, and assembling could be saved in the single variety communities where large, even-running lots of cotton with the same qualities of staple are concentrated at one point. It would be of interest, therefore, and helpful, if representative lots of the community cotton could be kept together and made available to manufacturers for large-scale mill tests.

Recent studies of cotton varieties indicate rather definitely that length, strength, and probably fineness also, are associated with variety. Hence, when a manufacturer has found a cotton from a one-variety community that suits his purposes to best advantage, he can go back to that community each year or to other communities where the same variety is being grown. In this way, too, where the variety is known, any shortcomings it may have in manufacture can be made known so that cotton breeders could have a real practical objective in their efforts toward further improvement.

COTTON MARKETING IN THE IRRIGATED SOUTH-WEST

The following is a summary of a pamphlet prepared on the above subject by Messrs. J. W. Wright and J. R. Kennedy, of the United States Department of Agriculture, Bureau of Agricultural Economics.

The cultivation of cotton in the irrigated South-west dates back to prehistoric times. But cotton has been an important cash crop in this region for only about twenty years and has become of major importance only during the last ten years. On the basis of cash income from farm production, cotton ranks first in Arizona, New Mexico, and the irrigated section of Texas, and ranks very high among agricultural products in the cotton-producing counties of California.

From the five-year period 1918-22 to the five-year period 1933-37, average yields per acre in this region have increased 119 per cent. ; acreage harvested, 185 per cent. ; and production, about 525 per cent. Almost one-half of the increase in average yields per acre during the twenty-year period 1918-37 has occurred during the last five years. The five-year average yield per acre has increased from 377 lbs. during 1928-32 to 507 lbs. during 1933-37 (34 per cent.) ; production, from 419,000 bales to 655,000 bales (56 per cent.), and acreage, from 531,000 to 618,000 (only 16 per cent.).

During the 1935-36 season Acala was the principal variety grown in the region, accounting for 100 per cent. in El Paso and Hudspeth Counties in Texas ; 99 per cent. in California ; 97 per cent. in New Mexico ; and 69 per cent. in Arizona. In Arizona a small proportion of the crop was planted to the Mebane and Stoneville varieties. These were grown

chiefly in Yuma County. American-Egyptian, including both Pima and SXP, accounted for 13 per cent. of the Arizona production.

The major part of the cotton was Strict Middling and Good Middling Extra White in grade, and was $1\frac{1}{8}$ inches and longer in staple.

Growers market their cotton chiefly through the agencies that finance production. In 1935-36 cotton-finance companies handled about 50 per cent. of the production; co-operatives, 17 per cent.; cotton merchants, 17 per cent.; local independent ginner, 11 per cent.; and local independent buyers, 5 per cent. Cotton-finance companies and co-operatives furnished the greater part of the production credit but other types of buying agencies, with the exception of local independent buyers, financed production to some extent.

A significant characteristic of the marketing system in this region is the selling of cotton by growers for forward delivery. The price and basis usually are fixed at the grower's option.

Growers usually sell their cotton in relatively large lots. During 1935-36 only 2 per cent. was sold in single-bale sales; 11 per cent. in lots of from 2 to 5 bales; 53 per cent. in lots of from 6 to 50 bales; and 34 per cent. in lots of 51 bales or more.

More than 90 per cent. of the growers reported that they had some information relative to market prices prior to selling their cotton. Almost one-half of them reported that they had information with respect to futures prices, spot prices for Middling $\frac{7}{8}$ inch in the central markets, and premiums and discounts for grade and staple. Nearly 10 per cent. reported that they had no information except the buyer's price offer.

The principal mediums through which growers obtained market information were bulletin boards at gins, daily papers, co-operative basis sheets, and the radio. A few of the larger growers received market information by means of telegraphic reports.

Only 26 per cent. of the growers in California and 40 per cent. of those in Arizona reported they had classification on their cotton at time of sale, 71 per cent. of the growers in New Mexico and 91 per cent. in El Paso and Hudspeth Counties, Texas, reported that they had classification. This classification was obtained principally from agencies through which the grower marketed his cotton. Only a very small part was classed by agencies other than those having an interest in the transaction.

Practically all cotton was left on gin yards pending sale by growers. Almost 90 per cent. of the cotton was sold on gin weights. Delivery to buyers took place principally at gin yards.

Following the custom of growers in other areas, most of the cotton-seed was sold to ginner. However, a substantial proportion of the cotton-seed in New Mexico and in El Paso and Hudspeth Counties in Texas was delivered by growers or their agents to farmers' co-operative or farmers' joint-stock oil mills.

For the last ten years the ultimate destination of irrigated cotton has been predominantly foreign. In 1935-36 about 31 per cent. was exported to Europe and 54 per cent. to the Orient. The remaining 15 per cent. was consumed domestically, of which California mills took about 5 per cent.; North-eastern and New England mills, about 8 per cent.; and

South-eastern mills, 2 per cent. The larger part of the cotton grown in Arizona and California was exported to the Orient whereas the major part of the cotton from New Mexico and Texas was exported to Europe.

The Orient has a comparative advantage in transportation costs over other importers of irrigated cotton. During 1935-36 cotton from the irrigated South-west moved to domestic mills in the South-east and in New England at competitive rates with foreign destinations other than the Orient.

A characteristic feature of the marketing system in the irrigated South-west is the integration of buying and merchandising with production credit, ginning, cotton-seed crushing, and compressing facilities. In 1935-36, less than 25 per cent. of production was handled by firms engaged exclusively in buying and merchandising the lint. Nearly 75 per cent. of the crop was handled by firms which in addition to buying cotton engaged also in financing production, 56 per cent. by those engaged in ginning, 44 per cent. by those engaged in crushing cotton-seed, and 20 per cent. by those engaged in compressing.

Buying agencies reported that almost one-half of their purchases from growers during 1935-36 were based on individual bale classification for grade and staple and more than two-fifths were based on the average quality of previous purchases. However, only a small proportion of the buyers owned or had access to the official cotton standards for grade and staple.

About 37 per cent. of the purchases made direct from growers were hedged daily by the sale of futures; 48 per cent. was reported daily to their firm by salaried, commission, or joint-account buyers; and 13 per cent. was sold daily by the original purchaser. The full risk in price change was assumed by the original purchaser on only about 1 per cent. of the cotton handled.

Selling practices of firms located in the South-west probably differ little from those located elsewhere. Probably a larger percentage of the cotton is marketed direct to mills or importers by first buyers than is the case in some other sections. This practice is facilitated because of the relative uniformity in the grade and staple of the cotton due in large measure to the predominance of a single variety of cotton throughout the region.

Cotton is sold by merchandising concerns largely on sample or against type.

Only about 32 per cent. of total sales by merchandising firms were made at a fixed price. The remaining 68 per cent. of sales were made on call. Sales against buyer's call accounted for 42 per cent. and against seller's call, for 26 per cent.

Although most of the cotton was purchased from growers on gin weights, sales by merchandising concerns were made principally on compress weights (36 per cent.) or on buyer's reweights (46 per cent.). Buyer's reweights include mill weights and landed weights on export cotton.

The decreased premiums received by growers since 1927 as compared with the years immediately preceding have apparently been due prin-

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cipally to (1) the decrease in central-market premiums of all growths, and (2) the fact that irrigated cotton has sold at discounts under the quotations for non-irrigated cotton. Such discounts ranged during 1935-36, from an average of 45 cents per bale for Strict Middling $1\frac{1}{32}$ inch cotton, to \$2.90 per bale for Good Middling $1\frac{1}{8}$ inch cotton. Average discounts for all cotton above Middling in grade and longer than 1 inch in staple was \$1.45 per bale. Merchandising margins do not appear to be sufficient to account for any part of the decrease in premiums during the last decade.

When sold as single bales, cotton classed as Strict Middling and Good Middling $1\frac{1}{16}$ inches and $1\frac{1}{8}$ inches was sold by growers at premiums that were not significantly above those for Middling 1 inch.

Irrigated cotton, Good Middling in grade, was sold by merchandising concerns, at shipside, for an average of 9 points above the average price received for Strict Middling. Middling sold at an average discount of 31 points below Strict Middling. Cotton of $1\frac{3}{32}$ inches in staple length sold at 10 points above, and $1\frac{1}{8}$ inches at 17 points above $1\frac{1}{16}$ inch cotton. Discounts for $1\frac{1}{32}$ inches and for 1 inch staples were respectively 13 points and 25 points below $1\frac{1}{16}$ inch cotton. The average basis for grade on all sales Middling and above was equivalent to Strict Middling, and the average basis for staple was 5 points above that received for $1\frac{1}{16}$ inches.

The effect of outlets on shippers' classification is indicated by the fact that during 1935-36 less than 4 per cent. of the cotton originating in Arizona and California and shipped from Pacific ports (principally to the Orient) was classed by shippers as $1\frac{1}{8}$ inches and longer. About 9 per cent. of the cotton originating in New Mexico and in district 1 of Texas and shipped principally to Europe and domestic mill points, was classed by shippers as $1\frac{1}{8}$ inches and longer. According to official estimates, about 17 per cent. of the production in Arizona and California and 21 per cent. of the production in New Mexico and District 1 of Texas was $1\frac{1}{8}$ inches and longer.

The production of American-Egyptian cotton is confined to central Arizona. The two commercial varieties are Pima and SXP. Cotton of these varieties ranges from $1\frac{1}{2}$ inches to $1\frac{5}{8}$ inches in staple length and averages about $1\frac{9}{16}$ inches.

From 1924 to 1932 average yields of American-Egyptian were about 30 per cent. less than yields of upland, but during the five years 1933-37 they were about 53 per cent. less than upland. Although yields of American-Egyptian decreased somewhat during the latter period, the loss in comparative advantage was due largely to increased yields of upland.

Consumption of American-Egyptian cotton is confined principally to domestic mills. In the early 1920's this cotton was used principally for the manufacture of tyre fabrics, whereas manufacturers of fine goods use the greater portion at present.

A distinctive feature of the marketing of American-Egyptian cotton is that all transactions from grower to spinner are based on net weights.

The outstanding problem facing the cotton industry in the irrigated South-west is the development of alternative market outlets. Additional markets, especially those using the higher grades and longer staples

(1½ inches and longer) should be developed to keep pace with the expansion in acreage and the improvement in staple length. The recent increase in consumption of irrigated cotton in domestic mills and in India is encouraging.

ACREAGE IN THE DELTA

Mr. W. M. Garrard* in a survey published in a recent issue of the *Staple Cotton Review*, states as follows, regarding the question of acreage planted to cotton in the Delta :—

The time has arrived when more consideration is given to prospects for the new crop than to the stock of old crop now on hand in the Delta. In connection with new crop prospects, we have obtained some official data that we think will be of interest. Last season there were planted in the Delta area 1,418,000 acres to cotton. On this acreage there were produced 1,279,000 box bales of cotton. According to the Association's record, the average weight of Delta cotton last season was 530.3 lb. When we reduce the running bales to 500 lb. weight, we find that we had a total production in the Delta last season of 1,356,507 bales of 500 lb. weight, or almost 500 lb. of lint cotton per acre on every acre planted to cotton. This, of course, is a record yield. It has never been equalled before and, in all probability, will never be equalled again.

The allotted cotton acreage for the current year in the Delta is 954,630 acres. As practically all growers in the Delta are complying with the programme, the acreage planted to cotton should be only slightly above the allotment, but it will be somewhat above the allotted acreage. If we assume there will be 1,000,000 acres planted to cotton in the Delta this season, and we calculate the prospective yield on the average yield per acre for the past ten years (270 lb.), we find that the indicated production is 540,000 bales. If the yield per acre is calculated on the average for the past five years (315 lb.), which is the highest average for any five year period since records have been kept, we find that the indicated yield for the Delta this season is 630,000 bales.

Let it be definitely understood that we make no prediction as to the probable yield for the current year. We simply give you these figures so that those who are interested in the growing crop may have a background on which to do their own estimating.

The condition of the crop at this time is not good. The crop is from two to three weeks late. There are a few sections in the Delta where a normal condition prevails, but in most areas there has not been sufficient rain to produce an average stand. In a number of sections, practically no cotton has come up to a stand. As a whole, on the cold, stiff land there

* General Manager of the Staple Cotton Co-operative Association.

is little, if any, cotton up to a stand. The condition is decidedly spotted, not only in reference to various sections of the Delta, but it is spotted on nearly every individual plantation in the Delta. Where sufficient rain has fallen and the cotton was planted on sandy loam land, the condition is what we term normal. But on the back land, the stiff land, and the cold land, the condition is from only poor to fair, and mostly poor.

It is safe to assume that if we produce a crop of 600,000 bales this season, at least 250,000 bales will be approximately $1\frac{1}{8}$ in. in length. This would leave only 350,000 bales of $1\frac{1}{8}$ in. and longer staples to be produced in the Delta this season.

AIR CONDITIONED CLASSING

Cotton classing and fibre research by the United States Department of Agriculture at Washington soon will be conducted under conditions of humidity, temperature, and air currents far more accurately controlled than heretofore.

It is believed that the Bureau's cotton classing room and laboratories, now being air-conditioned, will be the first to be equipped with a combination of several new engineering features. Special control instruments make this air-conditioned, cotton "work shop" a precision installation. The controls in certain of the laboratories permit any variation of temperature from 32 degrees Fahrenheit to 100 degrees. They allow any relative humidity within a range from 10% up to 97%—practically to the point of saturation. Any temperature that it is desired to maintain will not vary more than one degree up or down.

For the cotton classing room a 70-degree temperature and a relative humidity of 65% will be maintained. These are standard conditions for classing under the U.S. Cotton Standards Act. In the air-conditioned laboratories will be made studies of water absorption and general behaviour of cotton fibre under a wide range of temperature conditions and relative humidity. Relative humidity, it was stated, is to be measured, recorded and controlled directly and independently of temperature control, and is perhaps the first textile installation so regulated. The adding to or taking out of water vapour from the air to maintain a desired humidity is done with chemicals that have special affinity for water.

Naturally cooled water, from an 80-foot well that has a tested capacity of 340 gallons per minute, will reduce the extent to which artificial refrigeration is used. Laboratory window openings, closed with glass brick instead of the conventional sash and panes, will serve both to insulate against outside temperatures and to diffuse light through the rooms. Perhaps the most novel of the engineering details is the reliance upon radiation of heat to and from coils placed in the rooms themselves. For example, chilled water in summer is passed through the radiators that are used for winter heating. In one particular laboratory room such radiator coils are on all walls and ceiling and even embedded in the floor.

This system will minimise air currents by excluding direct wind velocities created by some types of air-conditioning systems.

It is planned to have the laboratories equipped with air-conditioning by August 1.

THE WEEVIL SITUATION

According to the New York Cotton Exchange Service, it is believed in many quarters that the current crop is more susceptible to weevil damage than the last crop, especially in the Eastern belt. This thought is based on several facts. It is pointed out that the Eastern States sustained considerably more weevil damage last year than the year previous, apparently giving evidence of an upward trend in the weevil cycle. The cotton belt as a whole did not have as much very cold weevil-killing weather last winter as in some previous winters, although last winter was colder than the winter immediately preceding. The crop is late over most of the belt, except in parts of the Atlantic States. With the crop entering the period when summer weather control of the weevil is of great importance, the weather has recently been pro-weevil. However, the weather during the next three to four weeks will doubtless constitute the most important factor in determining how much damage the weevil will do this season. Hot, dry weather would hold the weevil in check. Cool, rainy weather would permit it to multiply rapidly and ravage the crop.

According to the American Cotton Crop Service, weevil-killing temperatures during the week ending July 11 were the rule over the Western and Central Belts. This year a considerable number of weevils reached maturity in the southern third of the Belt prior to July 1. However, since about July 4 mortality among the immature stages of the first weevil generation has run considerably above 90 per cent. in most localities and we consider the weevil threat, average weather conditions prevailing henceforth, largely out of the picture. Local areas in the southern half of the Belt will report excessive weevil damage, but for the Belt as a whole the past week of weevil-killing temperatures insures only moderate damage under average summer weather conditions.

NEW INSECT PEST IN U.S.A.

Mention has been made in the American Press recently of the appearance of a new insect pest in the South which is said not only to be as menacing to cotton as the boll-weevil, but further, a destroyer of corn, sugar cane, peanuts and other crops.

The new enemy of the farmer is the South American white fringed beetle. Since its discovery on a wharf near New Orleans last September by entomologists, the insect has spread in four Southern States and has been found as far East as Pensacola, Florida. Its rapid spread is held by some to be comparable to the boll-weevil invasion from Mexico, which

was the direct cause of great cotton crop failures in the early nineteen-twenties.

United Press advices from New Orleans said United States entomologists have found 10,000 acres of farm lands in Louisiana, Mississippi, Alabama and Florida infested with the new pest. An army of 100,000 volunteers, including agricultural schools, garden clubs, boy scouts, co-operative organisations and others is being recruited in the four States to combat the new pest. The United Press reports characterised the beetle as "one of agriculture's greatest menaces," and said it "attacks cotton with the ferocity of the boll-weevil and may replace it in the amount of destructiveness in the South." It is believed originally to have come ashore from a South American ship.

FARM PRICE OF AMERICAN COTTON

The average price received by cotton farmers throughout the American Cotton belt last year was 12.90 cents per lb. ; in 1938 the average price received to date is 8.40 cents.

CROP REPORTS

Messrs. Geo. H. McFadden & Bro., of Houston, Texas, review the crop situation to July 5 as follows :—

Resume : The weather during the first part of the week in the Eastern half of the Belt was rainy and nights were cool and, although these conditions were distinctly unfavourable for the crop in this section, the latter part of the week was the exact opposite, being clear with normal temperatures prevailing. These latter conditions were very favourable. In the Western half of the Belt, excepting for some heavy rains in the North-west, the week was mostly clear with a few scattered showers. Temperatures, although slightly below normal at the beginning of the week in the North-east portion, were about normal and on the whole the weather was generally favourable.

Clear weather with higher temperatures is needed in all sections, although a good rain would be beneficial in the western part of Texas.

Cultivation averages about fair in the Eastern Belt and, although many fields are still grassy, a general improvement has been reported. In the Central Belt cultivation is fair to good, and mostly good in the Western Belt.

A good taproot has developed in most sections except in portions of the Eastern and Central Belts where only a fair root system has developed.

Stands are mostly good in the Western Belt, but average only fair in the East with considerable irregularity in some areas. Plants are in healthy condition in the West and in most of the Central States, while condition ranges from poor in the north to mostly good in the southern portion of the Eastern Belt. Cotton is blooming freely in the southern third of the Belt and beginning in most other sections.

Weevil infestation continues heavy in most of the Eastern Belt and in portions of the Central Belt. Weevil is also present in scattered localities in the Western Belt. Although too early to determine, damage appears to be moderately heavy in some localities in the Atlantic States and in portions of Mississippi. Compared with last year at this time weevil infestation and damage is considerably heavier in the Atlantic States, Mississippi, and Louisiana and about the same elsewhere. Other insects are still of minor importance.

The crop generally made good to excellent progress, especially in the western

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half of the Belt, the only exception being in the north-eastern portion where it was rather poor.

Regarding acreage the Agricultural Adjustment Act of 1938 originally permitted a planted acreage in cotton of approximately 26,300,000 acres. Later the Act was amended which increased the quotas by about 2,000,000 acres. As considerable acreage had been planted before the revised allotments were issued it was not possible for some of the producers to take advantage of the increased quotas. Our surveys during the past two months have emphatically indicated that farmers were complying almost 100% with the acreage programme. In spite of these predetermined factors, there has been a considerable variation in acreage ideas.

The *American Cotton Crop Service*, of Madison, Florida, reports as follows under date of July 6, 1938.

With the end-June condition of the crop lower than for the same date last year and the first weevil generation now hatching in large numbers over the southern half of the Belt, interest in probable outturn of the crop becomes the outstanding feature of the present outlook. We believe weather conditions during the next eight weeks will answer the question of whether the crop will be above or below the ten million bale figure. It is quite generally known that the crop is late in practically all important producing areas except the Coastal Plains area from Alabama eastward. In this area, however, weevil numbers threaten to prevent large yields such as have been secured during the past three years. Over much of the northern half of the Belt east of the Mississippi River the crop is late and showery weather conditions have prevented proper cultivation resulting in grassy fields and little opportunity to poison the weevil. In the western half of the Belt the crop is seven to ten days late on the average from Corpus Christi, Texas northward with some exceedingly late-planted areas in the Panhandle section. Weather conditions throughout the month of June were mostly showery with temperatures seldom reaching the weevil-killing zone. Except in the Coastal Plains area of the Eastern Belt, very little poisoning for weevil control has been reported. Owing to excessive moisture in most areas of the southern third of the Belt, the plant is larger than usual for July 1st and shades the soil to such an extent that little or no weevil control from high temperatures may be expected in the future.

Messrs. Weil Brothers, Montgomery, in their Crop Letter dated July 1, 1938, write as follows:—Since June 15 growth and cultivation of cotton have made marked improvement and progress in the southern sections of the Eastern Belt. The backward condition of approximately two weeks is being overcome to some extent in southern and central Georgia, Alabama and Mississippi; most fields are squaring, blooming and taking on fruit in a satisfactory manner. The potential danger from weevil is very significant, with some actual damage already being reported. Heavy and frequent rains and too low temperatures have not helped in the northern sections where a lateness of ten days to two weeks continues. Here the plant suffers from lack of cultivation and grassy fields.

West of the Mississippi River the weather has been favourable and the crop has made fair to good progress. Rains have been ample but not excessive, and temperatures have been normal—neither too hot nor too cool. The plant, although small in some localities, is healthy and squaring and blooming normally. Except in a few localities there are no reports of weevil infestation.

June is not the best month to gauge or forecast the crop, but at least it is important in the furnishing of a foundation. Extended periods of hot, dry weather are needed over the whole belt, except in West Texas where rains would be beneficial. Weather conditions have favoured crops other than cotton and present reports indicate satisfactory yields of grain, hay, truck, etc.

The emphasis of government buying orders together with the strong advance in prices has brought an upturn in cotton goods both here and abroad. Sales on Wall Street the last two weeks were very heavy and are said to equal or exceed March 1937. This has created a better feeling all around, and mills are increasing operations. Demand for cotton for July and August has been more active.

The *New York Cotton Exchange* in their weekly report dated June 27 state that aside from the weevil threat, the crop situation appears to be fairly good, on an average. Some experienced crop observers believe that the condition of the crop is equal to a ten-year average. Reports of grassy fields have been

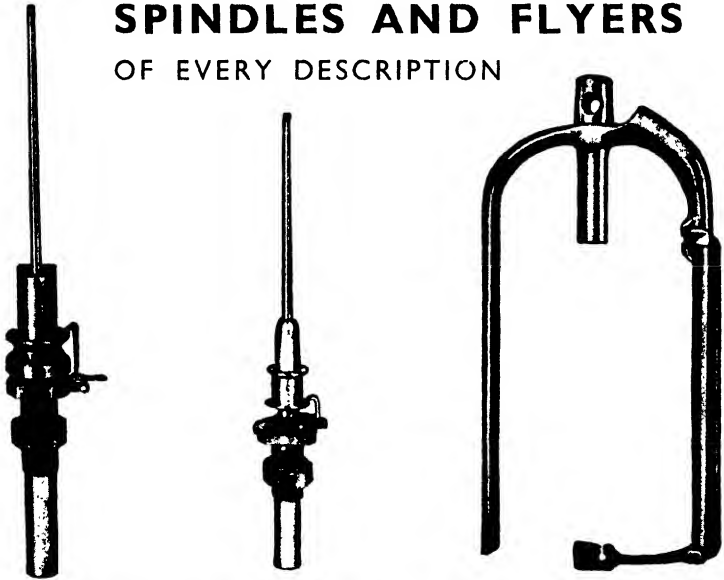
received from various areas, and these may be more general in the eastern and central sections following the recent rains, but by far the greater portion of the belt is at least fairly well cultivated, or could be put into a good state of cultivation if there were even a short spell of dry weather. Stands are fair to good, on an average, with plants generally healthy. The crop is still late, however, over the greater part of the belt. In some areas in the north-west, growers have had to replant four or five times. There is a natural tendency over the belt to compare yield prospects this year with the extremely high yields obtained last year, and the fact that such very high yields do not now seem to be in prospect may explain in some degree the tone of apprehension in advices from some areas. Trade ideas as to the planted acreage seem to be centring around 27,000,000 acres.

NEW ORLEANS COTTON EXCHANGE ANNUAL CROP FIGURES

The annual figures prepared by Mr. Henri Planche, secretary of the New Orleans Cotton Exchange, show that the total port receipts of American cotton for the season ended July 31, amounted to 8,075,000 bales, against 7,018,000 bales in the previous season. The net amount sent overland to mills was 608,000 bales, against 927,000 bales. Southern consumption was 4,879,000 bales against 6,427,000 bales. The total commercial crop was 13,562,000 bales, against 14,371,000 bales for the previous season.

World consumption of American cotton, including linters, is estimated at 12,162,000 bales, against 14,326,000 bales last season, and at 11,177,000 bales excluding linters, against 13,253,000 bales. The amount carried over is estimated at 13,803,000 bales, including linters, or 12,955,000 bales, excluding linters, against 6,108,000 bales and 5,740,000 bales, respectively, carried over on August 1, 1937.

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EGYPTIAN COTTON ACREAGE FOR 1938

The Ministry of Agriculture have published their preliminary acreage estimate for the new season, as follows :—

LOWER EGYPT :				1938	1937
Behera	..	..	..	242,740 feddans	248,411 feddans
Gharbia	..	..	..	421,816 "	435,252 "
Dakahlia	..	..	..	212,641 "	225,928 "
Sharkia	..	..	..	190,548 "	199,096 "
Menoufia	..	..	..	92,497 "	102,201 "
Qualiuba	..	..	..	49,154 "	55,552 "
Total	..	..	..	1,209,396 "	1,266,440 "
MIDDLE EGYPT :					
Giza	..	..	..	38,510 feddans	45,143 feddans
Beni-Suef	..	..	..	75,689 "	89,752 "
Fayoum	..	..	..	95,103 "	100,885 "
Minia	..	..	..	147,146 "	172,667 "
Total	..	..	..	356,448 "	408,447 "
UPPER EGYPT :					
Assiut	..	..	..	132,053 feddans	174,120 feddans
Girga	..	..	..	67,566 "	101,070 "
Keneh	..	..	..	13,913 "	20,851 "
Aswan	..	..	..	4,535 "	7,223 "
Total	..	..	..	218,067 "	303,264 "
Egypt Total				1938 1,783,911 feddans	1937 1,978,151 feddans
					1936 1,715,805 "
					1935 1,669,005 "
					1934 1,731,958 "
					1933 1,804,209 "

According to the official figures, the acreage under cotton this year is by about 10 per cent. smaller than in 1937, which is in concordance with most of the private estimates. The most striking feature of the new acreage is the curtailment of production in Upper Egypt where nearly 25 per cent. less cotton has been planted than last season.

More recently the Egyptian Ministry of Agriculture Bureau of Statistics gives details of the acreage of each growth in cultivation during the current year, with the corresponding figures for previous years, as follows :—

					1938	1937	1936
Maarad	..	..	..	..	101,646	80,811	71,656
Sakha 4	..	..	..	..	16,532	41,331	41,773
Sakellaridis	..	..	..	..	138,226	161,330	162,072
Giza 26	..	..	..	..	8,817	1,746	—
Giza 7	..	..	..	..	573,483	519,719	407,022
Giza 12	..	..	..	..	39,346	15,939	5,835
Fouadi	..	..	..	..	9,596	11,467	18,815
Giza 3	..	..	..	..	2,018	2,700	8,941
Ashmouni and Zagora	..	..	..	..	893,537	1,142,784	998,393
Other varieties	..	..	..	..	710	324	1,298
Total	..	..	..	..	1,783,911	1,978,151	1,715,805

EGYPTIAN COTTON GINNINGS

SEASON 1937-38

The following tabulation, compiled by the Statistical Service of the Egyptian Ministry of Agriculture, gives the amount of cotton ginned, according to varieties and grades, during the season 1937-38. The figures given relate to the net weights of ginned cotton, and are compiled from information furnished by the ginning establishments. The final ginnings in 1936-37 totalled 8,778,879 kantars, and 7,889,400 kantars in 1935-36.

Distribution according to grades.

Varieties		Total cotton Ginned	Low Mid. to Mid.F.	Above Mid.F. to G.F. (not including G.F.)	G.F. to F.G.F.	Above F.G.F. to Good	Above Good to F.G.	Above Good to F.G.
Maarad	.. Kantars	377,102	323	4,779	21,641	88,547	140,179	121,633
	%	100	—	1	6	24	37	32
Sakha 4	.. Kantars	162,825	148	1,776	10,764	28,658	54,162	67,317
	%	100	—	1	7	18	33	41
Sakellaridis	.. Kantars	557,935	1,884	11,532	47,487	149,624	190,473	156,935
	%	100	—	2	9	27	34	28
Giza 26	.. Kantars	6,930	—	—	756	223	—	5,951
	%	100	—	—	11	3	—	86
Giza 7..	.. Kantars	2,465,901	13,258	56,869	215,043	546,492	780,247	873,752
	%	100	1	2	9	22	31	35
Giza 12	.. Kantars	80,063	355	1,204	4,091	19,464	33,588	26,461
	%	100	—	1	6	23	39	31
Fouadi	.. Kantars	54,239	142	338	2,003	14,370	20,248	16,238
	%	100	—	1	5	27	37	30
Giza 3..	.. Kantars	13,535	—	12	2,382	9,338	1,797	6
	%	100	—	—	15	69	13	—
Ashmouni & Zagora	.. Kantars	7,087,123	19,308	205,478	1,152,794	3,124,907	1,868,012	716,024
	%	100	—	3	16	45	26	10
Other Varieties	Kantars	2,852	—	—	—	—	—	—
Scarto	.. Kantars	192,361	—	—	—	—	—	—
Total Cotton Ginned	.. Kantars	11,006,626	—	—	—	—	—	—

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TRANSPORT OF COTTON—NEW LAW

Following negotiations between the Ministry of Agriculture and the State Legal Services it has been decided to enact legislation prohibiting the transport of Ashmouni cotton from Lower to Upper Egypt. Also to prohibit the ginning of cotton grown in Lower Egypt in factories in Upper Egypt and vice versa, except by special permission from the Ministry of Agriculture.

It is stated that the object of the proposed law is to avoid the mixing of Ashmouni and Zagora cottons.

NEW GIZA 7 CONTRACT IN LIVERPOOL

A new contract for Giza 7 has been adopted by the Liverpool Cotton Association, entitled "*No. 2 Cotton delivery contract note for Giza 7 grown in Egypt and Sakellaridis grown in Egypt, also Sakellaridis or similar varieties grown in Sudan, based on Liverpool grade and staple standards.*"

Trading in this contract commenced on July 1, 1938, for delivery in January, 1939, and onwards. No further months of delivery in the existing Giza 7 contract will be quoted after June, 1939, and trading in that contract will cease on Friday, June 30, 1939. *The earlier Giza 7 contract will be described as No. 1 contract.*

The following are the terms of the new contract :—

Basis : Fully-Good-Fair Giza 7 (equal to the standard for grade and not inferior to the standard for Fair Staple Giza 7), with additions or deductions for such other qualities or growths as are within the contract.

Only the following growths may be tendered :—

Giza 7 or Sakellaridis grown in Egypt, and Sakellaridis or similar varieties grown in Sudan.

Any of these may be tendered under the description of their respective growths, or Giza 7 and Sakellaridis grown in Egypt may be described as Egyptian Cotton, and Sakellaridis or similar varieties grown in Sudan may be described as Sudan Cotton, provided that :—

1. Giza 7 or Sakellaridis grown in Egypt shall not be below the standard of Good-Fair Giza 7 in grade and not inferior to the standard for Fair Staple Giza 7.
2. Sakellaridis and similar varieties grown in Sudan shall not be below the standard of Fully-Good-Fair Giza 7 in grade and not inferior to the standard for Good Staple of Sudan Cotton.

Failing agreement between the parties, additions or deductions shall be made by arbitration for such qualities or growths as are within the contract according to their spot values as compared with the spot value of Fully-Good-Fair Giza 7 (not inferior to the standard for Fair Staple Giza 7), provided that :—

1. Sakellaridis grown in Egypt shall not be valued higher than Giza 7 of similar grade equal in staple to the standard of Fair Staple Giza 7.
2. Sakellaridis or similar varieties grown in Sudan equal in staple to the standard of Good Staple Sudan shall not be valued higher than Giza 7 of similar grade equal in staple to the standard of Fair Staple Giza 7. Any allowance for staple shall only be in so far as the staple tendered exceeds in value the standard of Good Staple Sudan Cotton.
3. No cotton shall be awarded a higher allowance than would be awarded to Giza 7 which is equal to the value of Good Giza 7, such allowance not to exceed 2d. per lb.

The unit of contract is 24,000 lbs. nett.

EGYPTIAN COTTON CONTRACTS

Replying to a question from Sayed Mohamed Badrawy Pasha asking what the Government intended to do about the decision taken by the Cotton Bourse Commission to change the basis of cotton contracts from "fully good fair" to "good," the Egyptian Minister of Finance stated recently that the General Assembly of the two Cotton Bourses had suggested that the basis of contracts should be raised from "fully good fair" to "good" in view of the fact that the quantities of cotton of the grade of "fully good fair" had become small in all varieties and did not represent the greater part of the cotton crop.

A committee had been formed composed of representatives of producers, exporters, the agricultural bodies and the Ministries of Finance and Agriculture to make a full study of the subject from all its aspects.

The Ministry of Finance would, in taking a decision on the matter, bear in mind the interest of producers before anything else.

As regards the concluding paragraph of the question he (the Minister) would like to draw attention to the fact that Cotton Bourse and Stock Exchange were organised by decrees in accordance with Article 72 of the Egyptian Commercial Code.

(Egyptian Gazette)

EGYPTIAN FUTURES CONTRACTS

The decision of the Commissions of the Alexandria cotton futures contracts, and of the Minet-el-Bassal Bourse to change the basis of cotton futures from fully good fair to good has now been confirmed. The decision was taken because the quantities of fully good fair cotton in all varieties had declined in recent years, and therefore did not represent the greater part of the cotton crop. We append herewith a table prepared by the Egyptian Ministry of Agriculture showing the classification, according to grades, of the cotton ginned during the course of the 1937-38 season.

Table showing the Classification, according to Grades, of Egyptian Cotton Ginned during the 1937-38 Season

Varieties		Total Ginned	From low Mid. to Mid. F.	Above Mid. F. to G.F. (not included)	G.F. to F.G.F.	Above F.G.F. to Good	Above Good to G. to F.G.	Above Good to F.G.
Maarad Cantars .. %	..	377,102	323	4,779	21,641	88,547	140,179	121,633
	..	100	—	1%	6%	24%	37%	32%
Sakha 4 Cantars .. %	..	163,825	148	1,776	10,764	28,658	54,162	67,317
	..	100	—	1%	7%	18%	33%	41%
Sakel Cantars .. %	..	557,935	1,884	11,532	47,487	149,624	190,473	156,935
	..	100	—	2%	9%	27%	34%	28%
Giza 26 Cantars .. %	..	6,930	—	—	756	223	—	5,951
	..	100	—	—	11%	3%	—	86%
Giza 7 Cantars .. %	..	2,465,661	13,258	56,869	215,043	546,492	760,247	873,752
	..	100	1	2%	9%	22%	31%	35%
Giza 12 Cantars .. %	..	86,063	355	1,204	4,991	19,464	33,588	26,461
	..	100	—	1%	6%	23%	39%	31%
Fouadi Cantars .. %	..	54,239	142	338	2,903	14,370	20,248	16,238
	..	100	—	1%	5%	27%	39%	30%
Giza 3 Cantars .. %	..	13,535	—	12	2,382	9,338	1,797	6
	..	100	—	—	18%	69%	13%	—
Ashmouni Cantars and Zagora .. %	..	7,087,123	19,308	205,478	1,152,794	3,124,907	1,868,612	716,024
	..	100	—	3%	16%	45%	26%	16%

NO RESTRICTION OF COTTON ACREAGE IN EGYPT

The Egyptian Minister of Finance was recently asked in the Egyptian Chamber of Deputies whether he did not consider it necessary, in view of the heavy decline in cotton prices, that the acreage should be restricted to one-third of the *zimam* for a period of three years, commencing from next year, and that the necessary law should be enacted this year? Otherwise, what steps did he suggest for maintaining prices at a reasonable level?

Dr. Ahmed Maher said that Egypt produced only 5 per cent. of the total world crop, and therefore, any variation of the acreage would not greatly affect prices. Moreover, past experience had shown that this policy was not in Egypt's interests. As regards the second part of the question, all that could be done was to reduce the cost of production, increase the yield and find new markets.

Replying to another question from Ahmed Mohamed Abaza, regarding the necessity of Government intervention in the cotton market to check the fall in prices, Dr. Ahmed Maher pointed out that Egypt was subject to and could not dominate world prices. Also it was not in Egypt's interest that the difference between Egyptian and other growths should be too great, otherwise it would be artificial. In view of these facts and past experience, the Government could not agree to direct intervention in the market although it would keep a careful watch on prices and try to find new markets.

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The rates have been fixed for the new cotton season 1938-39, but are subject to revision thereafter at any time at the discretion of the Trustees.

The following is a statement of the new tariff :—

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No. of Bales in Lot	No. of Samples to be drawn	TOTAL CHARGE PER LOT. Hydraulic Bales and Steam Pressed Bales
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21 „ 30	3	„ 75
31 „ 40	4	„ 90
41 „ 50	5	„ 100
51 „ 60	6	„ 120
61 „ 70	7	„ 130
71 „ 80	8	„ 150
81 „ 90	9	„ 160
91 „ 100	10	„ 180
101 „ 110	11	„ 190
111 „ 120	12	„ 200
121 „ 130	13	„ 210
131 „ 140	14	„ 220
141 „ 150	15	„ 225
151 „ 160	16	„ 240
161 „ 170	17	„ 255
171 „ 180	18	„ 270
181 „ 190	19	„ 285
191 „ 200	20	„ 300

*(P.T.100=One Egyptian £. P.T.97½ -One £ Sterling.)

DRAWN SAMPLE TESTS :	} Hydraulic Bales.
P.T. 30 per sample tested.	
DELIVERED SAMPLE TESTS :	
P.T. 20 per sample tested.	

WEIGHTS :

(a) *Hydraulic Bales.*

Bale weights to be taken (at time of drawing Samples) by clients' own weighers.

The Public weighers' weight notes are accepted by the Testing House Officials.

(b) *Steam Pressed Bales.*

Bale weights to be taken (at time of drawing samples) by the Pressing Companies' weighers.

The Pressing Companies' Official Weight Notes if certified will usually be accepted by the Testing House Officials.

NOTE.—A proposal is now under consideration whereby the Alexandria Testing House will supervise and certify the Alexandria weights of export cotton lots.

GREECE RAISES IMPORT DUTY ON EGYPTIAN COTTON

We learn from *L'Informateur*, of Alexandria, that the Greek Government has raised the import duty on Egyptian cotton imported into Greece from 68.7 piastres to 100 (£1) piastres per cantar (99 lb.).

Dr. JAMES TEMPLETON TO LEAVE EGYPT

The *Egyptian Gazette* recently announced that Dr. James Templeton is to leave the Egyptian Government service. Dr. James Templeton first took over his duties as botanist in the Ministry of Agriculture in 1921, coming with a high reputation from Edinburgh University. In 1926 he became Senior Botanist in the Botanical and Plant Breeding Section and was promoted Chief Botanist and Director of the Section in 1933, which post he has occupied until now. In 1937 H.M. King Fouad I honoured him with the Order of the Nile, in recognition of valuable services rendered to the country.

His work in Egypt has covered many aspects of research. By training and inclination a plant physiologist, he has actively investigated many important botanical problems, reflected in numerous original papers covering physiological and morphological aspects of the cotton plant.

Dr. Templeton's most important work, and that of the Section with which he has always been associated, has been in the development of new cotton varieties.

CROP REPORT

The *Commission de la Bourse de Minet-el-Bassal* publish under date July 7 the following crop report covering the month of June.

LOWER EGYPT.—The temperature during June was irregular. It was subnormal throughout the greater part of the month, but it then rose, and on the whole, despite damp fresh nights, was favourable to the plants. The crop is nevertheless still 15-20 days late.

Except for their backwardness, and with the exception of some districts, the plants are in good condition. In the early plantations they are budding, and there are some flowering.

Leaf-worm egg-masses have been reported in considerable quantities from all districts. But thanks to the energetic measures taken by the Government and to the efforts of the farmers themselves there has been little hatching, and the damage caused by the worms does not in consequence appear to be of much importance up to date.

Wilt has attacked the Sakel and Giza 26 plantations. The latter have suffered particularly severely. Giza 7, which was believed immune, has also been attacked, though to an insignificant extent.

Water for irrigation has been adequate.

UPPER EGYPT AND FAYOUM.—During the first half of June the temperature

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was irregular and subnormal, but in the rest of the month it was favourable to the plants.

Despite their backwardness of 10 to 15 days, the plants are in good condition and appear healthy.

Leaf-worm egg-masses have appeared throughout Upper Egypt, but they have been picked before hatching.

Water for irrigation has been adequate.

MARKET REPORTS

The following is extracted from the report of the *Egyptian Produce Trading Co. S.A.E.*, dated July 7 :—

The demand for SAKEL which showed an improvement a fortnight ago fell again to the lowest, and the volume of daily sales has declined to a most reduced figure. This cotton is really almost unsaleable. It is reported that 2,000 bales which were received on tenders by a firm in Liverpool one and a half years ago have been retendered through July Giza contracts, and all this is none too encouraging for this variety ; and, unless of a change in spinners' attitude to Sakel, we cannot see how this contract can advance and maintain itself above its present difference with Giza 7.

A much better undertone prevails for GIZA 7 with a hardening basis for all grades. Good staple cottons are becoming scarce and demand is noticed for all grades. The only cottons that can be found in a fairly large supply are those grading from GOOD to GOOD + $\frac{1}{4}$. High grades are held in strong hands whereas mediums and lows exist in very small quantities.

MAARAD no longer arouses much interest and the supply of this cotton is reduced to its lowest level.

High grades ASHMOUNI have been the object of an active demand, with a marked appreciation in basis. Business in mediums continues to be active, while low cottons are inexistent.

ZAGORA is being disposed of gradually at the low basis to which it fell, and we shall end the year with a fairly large supply of this variety, especially high grades.

NEW CROP.—In Upper Egypt, it seems that the estimated 8% reduction is below reality and information, on the whole, tends to indicate the figure of 12%. The crop is following its normal course with the exception of a 15 to 20 days' delay, but providing weather conditions are favourable from now on until picking, the yield per feddan might not be lower than last year's. Leaf-worm attacks have been noticed, but it seems that adequate measures have been taken with a view to neutralising their effect.

Acreage in Lower Egypt is almost equal to last year's with an increase in Giza 7 and Giza 12 at the expense of Zagora and Sakel. Here too, there exists a delay of 15 to 20 days and leaf-worm attacks have been very much severer than in Upper Egypt. Growers' complaints are very bitter, but as we are entering the critical period of the crop, it is difficult to give a definite opinion thereon. In any case, it is out of question that the yield per feddan will be near to last year's.

Telegrams :
"FARGHALYME," Alexandria

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Correspondents in Austria, England, France, Germany, Hungary, Italy, Japan, U.S.A., Switzerland, Poland and India.

CORRESPONDENTS INVITED FROM OTHER COUNTRIES

Messrs. Reinhart & Co., Alexandria, Egypt, in their market report dated July 8, 1938, discuss the probable carry-over of Egyptian cotton in Egypt as follows :—

According to the figures given below, the carry-over of cotton in Egypt at the end of this season will probably be about 2,100,000 cantars.

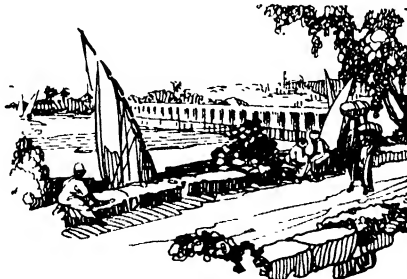
Carry-over September 1, 1937	Crs.	351,455
Cotton ginned during season 1937-38	„	11,008,862
	Crs.	11,360,317
Exports till July 7	Crs.	7,874,266
Consumed up-country, about	„	450,000
Consumed locally	„	213,722
	„	8,537,988
Visible supply in Egypt	Crs.	2,822,329
Estimated exports for remainder of season :		
July 8-31	Crs.	370,000
August	„	350,000
	„	720,000
Probable carry-over on August 31, 1938	Crs.	2,102,329

Exports are very satisfactory and much above those of last summer, viz. :

	1938	1937
May	Crs. 641,000	Crs. 445,000
June	„ 512,000	„ 417,000
July	„ —	„ 290,000
August	„ —	„ 236,000

We have good reason to believe that shipments from Alexandria during the remainder of the season will continue to be considerably larger than in 1937.

In spite of an actual visible supply in Egypt of approximately Crs. 2,800,000, a great scarcity of the more current qualities is felt. The remaining stocks mostly consist of medium stapled Sakellaridis, high grades Giza 7, Ashmouni, classing about “good,” and of top grades of Zagora. The other qualities are very scarce or completely exhausted.



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SUPPLEMENTARY MEMORANDUM ON THE COTTON CROP OF 1937/38

This memorandum deals with the final estimates of the cotton crop, and supplements the Final General Memorandum on the crop issued on February 21, 1938.

FINAL ESTIMATE OF THE COTTON CROP OF INDIA

Provinces and States	1937-38 (Provisional Estimates)		1936-37 (Final Figures)*		1935-36 (Final Figures)*	
	Area (1,000 acres)	Yield (1,000 bales)	Area (1,000 acres)	Yield (1,000 bales)	Area (1,000 acres)	Yield (1,000 bales)
Bombay (a)	6,023	1,208	5,991	1,120	6,637	1,380
Central Provinces and Berar	4,047	711	3,952	875	4,068	616
Punjab (a)	3,985	1,513	3,691	1,921	3,519	1,582
Madras (a)	2,556	505	2,512	497	2,693	537
United Provinces (a) ..	581	197	700	175	596	195
Sind (a)	1,049	394	989	521	812	331
Bengal (a)	94	31	94	28	73	24
Bihar	43	8	31	6	32	6
Assam	45	24	36	13	38	15
Ajmer-Merwara	37	15	34	12	35	13
North-West Frontier Province	22	4	21	4	19	3
Orissa	8	1	8	1	9	2
Delhi	2	1	2	1	2	1
Hyderabad	3,563	570	3,080	499	3,698	569
Central India	1,337	143	1,414	203	1,201	180
Baroda	914	186	871	137	837	156
Gwalior	668	78	714	106	602	124
Rajputana	524	63	534	73	486	79
Mysore	85	11	85	12	87	11
Total	25,583	5,663	24,759	6,204	25,444	5,824

NOTE.—A bale contains 400 lbs. of cleaned cotton.

* These are revised estimates as finally adjusted by provincial authorities.

(a) Including Indian States.

The detailed figures, according to the recognised trade descriptions, are shown in the following statement :—

TRADE DESCRIPTIONS

Descriptions of Cotton	Acres		Bales of 400 lbs. each		Yield per acre	
	(thousands)	(thousands)	(thousands)	(thousands)	(lbs.)	(lbs.)
	1937-38	1936-37	1937-38	1936-37	1937-38	1936-37
Oomras—						
Khandesh	1,313	1,304	326	273	99	84
Central India	2,005	2,128	221	309	44	58
Barsi and Nagar	2,352	1,948	402	344	68	71
Hyderabad-Gaorani	959	841	142	141	59	67
Berar	2,851	2,713	501	583	70	86
Central Provinces	1,196	1,239	210	292	70	94
TOTAL	10,676	10,173	1,802	1,942	68	76
Dholleras	2,532	2,686	484	449	76	67
Bengal-Sind—						
United Provinces	581	700	197	175	136	100
Rajputana	561	568	78	85	56	60
Sind-Punjab	2,633	2,516	981	1,251	149	199
Others	57	45	11	9	77	80
TOTAL	3,832	3,829	1,267	1,520	132	159
American—						
Punjab	1,772	1,626	691	900	156	221
Sind	653	561	240	296	147	211
TOTAL	2,425	2,187	931	1,196	154	219
Broach	1,464	1,493	360	348	98	93
Coompta-Dharwars	1,175	1,184	153	147	52	50
Westerns and Northern	1,860	1,603	192	165	41	41
Cocanadas	146	165	25	25	68	61
Tinnevellies	548	597	134	138	98	92
Salerns	202	190	35	35	69	74
Cambodias	580	516	225	198	155	153
Comillas and other sorts	143	136	55	41	154	121
GRAND TOTAL	25,583	24,759	5,663	6,204	89	100

The area sown with cotton in Burma is reported to be 550,000 acres, as against 519,000 acres last year. The yield is estimated at 151,000 bales of 400 lbs. each, as compared with 113,000 bales last year. The quantity likely to be exported from the present crop is estimated at 143,000 bales.

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CAMPAIGN AGAINST BOLL-WORM IN HYDERABAD

A vigorous campaign against the boll-worm has been undertaken in Hyderabad, the largest Indian State, where damage by this pest is costing the cotton growers more than £750,000 a year. Cotton is the most important commercial crop of the State, the total value of the yearly production averaging about £4,000,000. During the past five years exhaustive research into every aspect of the boll-worm pest has been made by the Agricultural Department. Leaflets containing full information about boll-worms and the measures recommended for their control, are now being distributed in large numbers in the cotton growing areas. Live and preserved specimens of caterpillars, pupæ and moths, samples of damaged buds, bolls and seed cotton and seed are being exhibited.

A number of measures of control have been proposed. It is recommended that after the final picking of the season, cattle, sheep, and goats should be left in the fields to graze, eating up buds and bolls that contain boll-worms at this time. Immediately after grazing, the lands should be harrowed and all cotton plants removed from the soil, including all the weedy growth in the fields. It is also recommended that no seed cotton should be left unginned in the cultivators' homes, markets, or ginning factories after the end of April, and that no seed cotton or seed should be imported from areas where pink boll-worms are known to hibernate in seed. The seed of early ripening varieties is recommended as suffering less damage.

(Textile Weekly, Manchester)

STAPLE LENGTH OF THE 1937-38 CROP

The Indian Central Cotton Committee issued recently Statistical Leaflet No. 1, Fifth Issue (1937-38). This contains the usual report on the staple length of the Indian cotton crop of the 1937-38 season, together with the Government official estimate and private estimates of the production by varieties. Extracts from the data provided are given in the accompanying table.

The particulars provided are based on the All-India Cotton Crop Estimates for the 1937-38 season, published by the Director-General of Commercial Intelligence and Statistics, Calcutta, and on information furnished by Directors of Agriculture regarding the production of improved varieties of cotton.

The presentation of estimates of what the trade consider to be the size of the current crop has been continued in the report with the co-operation of certain firms in Bombay, who compile independent estimates. These private estimates are not shown in the accompanying table, in which only the official Government estimates have been included. The private estimates given in the full report do not include domestic consumption, whereas the official figures include such consumptions.

The Indian Cotton Crop of 1937-38 Season Classified According to Length of Staple.

Based on the Provincial, State, and All-India Cotton Forecasts and on information specially supplied by the Provincial and State Departments of Agriculture

Description of cotton				Government estimated production (Thousand bales of 400 lb.)	
Trade name	Staple length (in 3/8 in.)	Spinning capacity			
Long Staple—Over 1 in.					
(1) Punjab-American—289 F.—(including 289 F.R.25)	..	34	30's warp or 40's weft	54	
Total—Long staple	54	
Medium Staple A—1 in.					
(2) Sind Sudhar (289 F.1)	..	32	32's warp	77	
(3) Punjab-American—289 F.43	..	32	35's/40's warp	47	
(4) Suri—Farm Cotton (1027 A.L.F. part)	..	32	28's/30's warp	12	
(5) Cambodia—Co. 2 (part)	..	32	25's/30's warp	32	
Total—1 in.	168	
Medium Staple B—3/4 in. to 3/8 in.					
(6) Suri—Farm Cotton (1027 A.L.F.)	30 to 31	24's/28's warp	53	512	
(7) Cambodia Co. 2 (part)	..	30	24's/28's warp	80	
(8) Jaywant	..	30	26's/30's warp	70	
(9) Punjab-American L.S.5	..	30	26's warp	38	
(10) Fentona Farm Cotton (Hagar 1)	..	28 to 30	24's warp	12	
(11) Karunganni—Farm Cotton (C-7, A-10 and KPT-1)	..	28 to 30	24's warp	37	
(12) Sind-American—4 F-98	..	28 to 30	26's warp	17	
(13) B.D. 8 (pure)	..	28	30's warp	1	
(14) Upland—Farm Cotton (Gadag-1)	..	28	24's/30's warp	13	
(15) Hyderabad Georani	..	28	24's warp	14	
(16) C.P. B. Verum	..	28	20's/24's warp	32	
(17) Suri ordinary	..	28	20's/24's warp	85	
(18) Cambodia, other than items (5) and (7)	..	28	22's/26's warp	93	
(19) Kumpita-Dharwar, other than items (8), (14), and (25)	..	28	22's warp	91	
(20) Northern	..	28	22's warp	15	
(21) Tinnevelles, other than item No. (11)	24 to 28	16's warp	97	..	
(22) Punjab-American—4 F	24 to 28	20's weft	540	..	
(23) Sind-American—4 F, other than item No. (12)	..	24 to 28	20's warp	146	
Total—3/4 in. to 3/8 in.	1,563	
Total—Medium Staple	1,721	
Short Staple A—3/4 in. to 3/8 in.					
(24) Salams Upland—Hagari (other than Gadag-1)	..	26 to 27	14's/20's warp	35	
(25) Dharwar Upland—Hagari (other than Gadag-1)	..	24	18's warp or 20's weft	15	
(26) Central India Malvi and Nimari	..	22 to 26	14's/20's warp	218	
(27) Madras Westerns (others than Hagari 1)	..	22 to 26	16's warp	92	
(28) C.P. No. 1 Omras	..	24 to 26	14's/18's warp	214	
(29) Dhollaria—Wagad	..	24 to 27	14's/18's warp	4	
(30) Hyderabad Kumpita-Dharwar	..	20 to 26	14's/18's warp	30	
(31) Bijapur and Bagalkot Jowari	..	20 to 24	14's/18's warp	222	
(32) Broach-Kanvi	..	20 to 24	14's/18's warp	26	
(33) Kharaband Omras	..	20 to 24	14's/18's warp	26	
(34) Coconadas and Warangal	..	20 to 24	14's warp	25	
(35) Bangals—N.W.F.P.	..	20 to 24	12's/14's warp	4	
Total—3/4 in. to 3/8 in.	945	
Short Staple B—3/4 in. to 3/8 in.					
(36) C.P. No. 2 Omras	..	16 to 22	10's/12's warp	512	
(37) C.P. No. 3 Omras	..	16 to 18	6's/8's warp	80	
(38) Hyderabad Westerns	12's/14's warp	70	
(39) Khandesh Omras	10's/12's reeling*	313	
(40) Kari and Nagar Omras	18	10's/12's reeling	38
(41) Kharaband Omras	18	10's/12's reeling	38
(42) Dholera—Muttika	10's/12's reeling	257	
Total—3/4 in. to 3/8 in.	1,621	
Short Staple C—3/4 in. and below					
(43) Bengal—Baghelkhand and Bundelk.	..	12 to 20	8's/10's reeling	3	
(44) Bengal—United Provinces	..	12 to 20	8's/10's reeling	198	
(45) Bengal—Rajputana	..	12 to 20	8's/10's reeling	178	
(46) Bengal—Sind (dett)	..	12 to 18	8's/10's reeling	154	
(47) Bengal—Sindh (dett)	..	12 to 18	8's/10's reeling	823**	
(48) Bengal—Bihar and Orissa	..	12 to 16	8's/10's reeling	9	
(49) Bengal—Western Bengal	..	12 to 16	8's/10's reeling	9	
(50) Cancillas	12's reeling	53	
(51) Others	8's/10's reeling	2	
Total—3/4 in. and below	1,322	
Total—Short Staple	3,883	
Grand Total	5,693†	

* Reeling is yarn spun for the Indian handloom industry.

† Adding the estimate of 450,000 bales for the annual domestic consumption of cotton in India, the total estimated production during the current season comes to 6,560,000 bales according to private estimates as against 5,693,000 bales according to official estimates.

** Includes 289,000 bales of Mollisium.

PRESS MARKS ON INDIAN BALES

In order to identify the press producing any particular bale in India, the Indian Government has authorised the following marks to be used by pressers in the various States in India. The marks given below refer to the State but each press has been allotted a number to be placed either before or after the identification mark. In the compilation of this list the position of the number is taken by an asterisk. Spinners having complaints in regard to any particular bale from India should note the press mark and an account of the complaint, together with samples, if necessary, should be forwarded to the Secretary, Indian Central Cotton Committee, Vulcan House, Nicol Road, Ballard Estate, Fort, Bombay. The press mark is usually found stencilled on the bale cover or sacking but is sometimes stamped on one or more of the bands.

Ajmer-Merwara	*J	Bir District	10HD2
Alipura State	IAP	Adilabad District	11HD*
Alwar State	*AL	Bidar District	12HD1
Assam	*A	Idar State	*ID
Bahawalpur State	*BH	Jaipur State	*JP
Balasinoor State	IBA	Jamkhadi State	1JK
	{ B	Jaora State	JR*
Bansda State	{ D	Jasdan State	VJ
	{ N	Jhabua State	*JH
	{ R	Jhalawar State	JL.PI.
Baroda State		Jind State	*JD
Amreli District	*BS.A	Jodhpur (Marwar) State	*JO
Navsari District	*BS/N	Junagadh State	4JN*
Baroda District	*BS/B	Katosan State	*KO
Mehsana District	*BS/M	Khairpur State	1KR
Barwani State	*BR	Kishangarh State	*KG
Bengal	*L	Kolhapur State	*KOP
Berar	*K	Kotah State	1KT
Bhavnagar State	*BN	Lakhtar State	LK
Bhopal State	*BP	Limbdi State	LM1
Bikaner State	*BK	Madras	*M
Bombay	*B	Malerkotla State	*MK
Bundi State	IBU	Maliya State	1MLY
Cambay State	ICA	Manavadar State	1MVR
Central Provinces	*C	Mewar State	*ME
Chhota-Udepur State	ICU	Miraj State (S.B.)	MS
Cutch State	*CT	Morvi State	MV
Datia State	IDT	Mudhol State	1MUD
Dewas State-2	IDJ	Muli State	ML
Dhar State	DH*	Mysore State	My.*
Dhrangadhra State	DG	Nabha State	*NB
Faridkot State	*FK	Narsingarh State	1NG
Gondal State	*GN	Nawanagar State	*NA
Gwalior State	*GS	North-West Frontier Pro-	
Holkar (Indore) State	*HS	vince	*F
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Parbhani District	2HD*	Porbandar State	*PB
Nanded District	3HD*	Punjab	*P
Nizamabad District	4HD*	Radhanpur State	1RA
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Osmanabad District	6HD*	Rajpipla State	*RP
Gulbarga District	7HD*	Ratlam State	*RL
Raichur District	8HD*	Sachin State	1SA
Karimnagar District	9HD*	Sangli State	*SLI

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Savanur State	..	SV	Wadhwan State	*WA
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Sind	..	*S	Agency	*WI
Tonk State	..	*TK				

COTTON GROWING EXPERIMENT IN BENGAL

The Indian Correspondent of the *Textile Weekly*, of Manchester, states that a very interesting experiment has been started in Bengal, to grow long staple cotton in the province, and a committee known as the Bengal Cotton Committee has been formed for the purpose. The Bengal Millowners' Association and the Government of Bengal are to make equal contributions to carry out the experiment. The prospects of success are said to be good. Bengal has a cotton mill industry of its own, which is expected to grow rapidly and consume all the cotton that may be grown. Recent investigations carried out by the Industries Department have shown that the scope for the development of the cotton mill industry in Bengal is immense, as Bengal's consumption of cotton goods imported into the province from other provinces and from foreign countries amounts to nearly Rs. 14 crores in value. Labour and climatic conditions are also very favourable. If the cotton growing experiment succeeds, Bengal mills will have cotton at hand, which they have now to import from other provinces or overseas.

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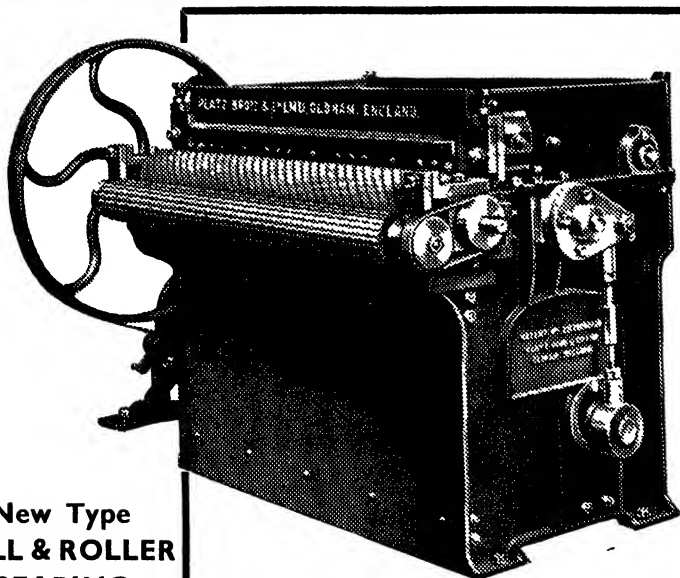
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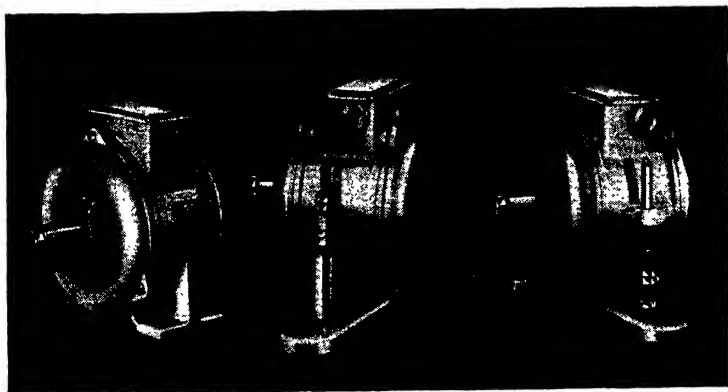
Other outstanding features of this machine are :—

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SOME PRODUCTION AND BIOLOGICAL ASPECTS OF COTTON QUALITY*

By H. W. BARRE†

The co-ordinated cotton research programme of the United States Department of Agriculture and the State Agricultural Experiment Stations has now been under way several years and while many of the researches are still in the early stages, some important results and implications have already come from these studies. Brief mention is made here of some of these.

It is interesting to note that the plan for a co-ordinated research programme is working out very nicely. There are more Federal and State agencies and more private and commercial agencies working on cotton and cotton products than on any other crop or commodity, and yet we feel that the work being done by all of these agencies is being well co-ordinated. The Federal and State agencies are, in fact, working together on a joint programme for more economic production of cotton of improved quality and for the more efficient and wider use of American cotton, and the private and commercial agencies are working effectively with the public agencies to these same ends.

Reference has been made in earlier papers to the Regional Variety Study which involves the planting of 16 varieties or types of cotton from the same seed stock at 14 different places across the cotton belt and seven varieties at four locations in the irrigated sections of the south-west for three years in succession in order to study the influence of variety, soil, climate and season on fibre properties and spinning value. While the fibre analyses and spinning results from these studies have not been completed and only preliminary results from the first year's crop are available, some of these are interesting and apparently important from the standpoint of improving the quality of our cotton.

* Presented at the meeting of Subcommittee A1, Sec. 1, on Raw Cotton of Committee D-13 (Textiles), American Society for Testing Materials, in Washington, D.C., March 10, 1938.

† Principal Pathologist in Charge, Division of Cotton and Other Fibre Crops and Diseases, Bureau of Plant Industry, U.S.D.A.

FACTORS DETERMINING QUALITY.

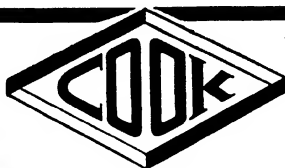
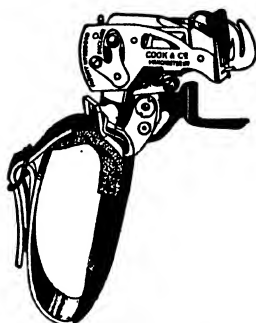
The indication so far (the effect of season on fibre properties has not yet been studied) is that the variety seems to be the most important single factor in determining quality. In the case of staple length, variety is very definitely the most important factor. Contrary to popular opinion, there is seldom more than $\frac{1}{8}$ in. difference in the staple length of any particular variety when grown in the south-east or in the Mississippi Delta under optimum moisture conditions, or when grown under the extremely dry conditions of 1935 in Oklahoma and west Texas. The combined average staple length of these 16 varieties in 1935 varied only from $\frac{1}{8}$ to $\frac{1}{4}$ in. under these widely different conditions. It was somewhat surprising to find that the longest average staple length of these varieties at any point in the cotton belt in 1935 was obtained from the test located near Greenville, Texas. The shortest staple for this season was produced at Stillwater, Oklahoma, where there was almost a complete crop failure because of extremely dry weather. These findings tend to confirm the belief that inheritance and soil moisture are the two main factors in determining staple, and of these inheritance is the more important. This demonstrates, fairly conclusively, that the only practical way to improve the staple length of cotton is to plant varieties that are known to produce longer staple.

FIBRE FINENESS AN INHERITED QUALITY.

Fineness of fibre as determined by weight per unit length appears to be inherited just as definitely as staple length. These 16 varieties grown across the belt show the same relative fineness at all of the places where they were grown, and in most cases about the same actual fineness. In this connection the cross-section method of studying fineness and shape of fibres now being developed by Dr. Karrer and Mr. Bailey of the Bureau of Agricultural Economics, is of interest to students of genetics and those engaged in cotton breeding and in adapting cotton possessing different fibre properties to special uses. Since fineness seems to contribute materially to spinning value, we have placed considerable emphasis on this property in our genetics research. The very fine Hopi cotton, which Dr. Kearney of the Bureau of Plant Industry called attention to several years ago, and which Dr. Webb and his associates in the Cotton Marketing Division of the Bureau of Agricultural Economics have studied, is being used as one of the parents in many of our crosses. The preliminary work along this line indicates that fineness is inherited in a definite way. There are, however, some indications that the growth conditions obtained at the different locations affect fineness to some extent. This question is being carefully checked from the large amount of material available from the Regional Variety Study and from certain physiological investigations under way at different places.

FIBRE STRENGTH AND YARN STRENGTH.

Studies of strength of the fibres by the Chandler bundle method show that there is a very wide difference in the average strength of these

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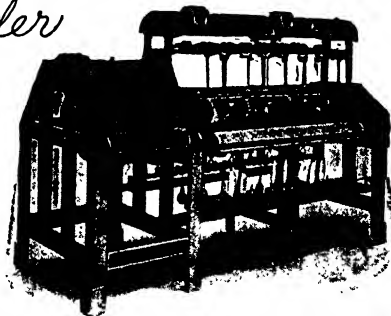
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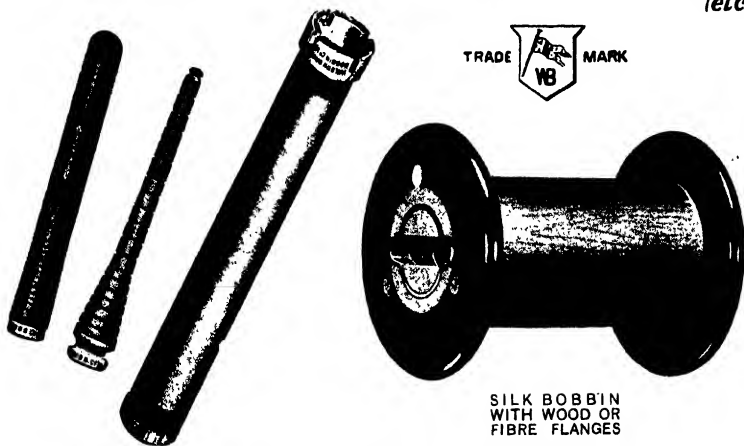
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varieties at the different locations. The varieties in most cases, however, rank in the same relative order, some varieties producing stronger fibre than other varieties at all locations. The strength as determined by this method is closely correlated with the spinning value as indicated by yarn strength, and some of the preliminary results from the spinning tests of these varieties at the spinning laboratories of the Bureau of Agricultural Economics throw more light on this question. Mr. M. E. Campbell, in charge of all of their cotton spinning research, and Mr. R. L. Lee, in charge of the spinning work at College Station, Texas, have summarised some of the preliminary results secured from spinning seven of these varieties of the 1935 crop at eight of the locations in a paper which they prepared for a recent conference at College Station, Texas. While these results (to be published later) cover only seven of the varieties included in the study and only eight of the locations for 1935, the preliminary findings are of considerable interest. These results indicate that the location at which the cotton is grown and the seasonal conditions under which it is produced affect the strength of the yarn. Since this work represents only one crop, we do not know, of course, how much of the effect is due to seasonal conditions and how much might be due to location, but when we average the yarn strength for the seven varieties at each of these places we find that for this particular season the cotton from Arkansas and East Texas produced a stronger yarn than the cotton from Louisiana and South Carolina. With the exception of the Delta region of Mississippi, the locations which produced the weakest yarn were the ones where the largest yields were obtained, and the cotton which produced the strongest yarn came from the locations where the yield was less.

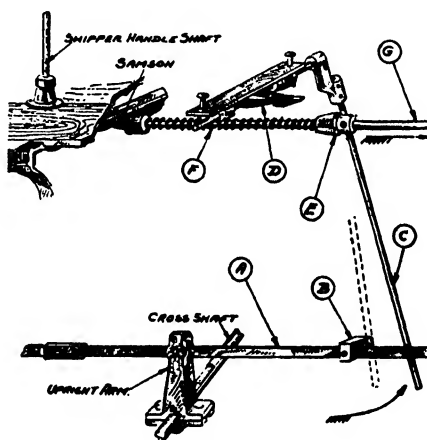
The influence of variety on yarn strength was more pronounced, and since these eight locations were widely separated over the cotton belt extending from Florence, S.C., to Lubbock, Texas, and different seasonal conditions obtained at the various places, the results are probably a little more significant. The seven varieties included in these spinning tests are ranked in the following order in terms of yarn strength: Acala, Rowden, Dixie Triumph, Startex, Oklahoma, Triumph, Qualla, and Half and Half. It is interesting to note that with a few exceptions these varieties ranked in approximately the same order at all of the locations. The most striking exception was in the case of Dixie Triumph which averaged third from all locations but ranked second at one and sixth at two places, and Qualla which ranked sixth at all of the places except two, and in these cases ranked third. Half and Half, which is the shortest and coarsest of all of the varieties, ranked at the bottom in each case, and Acala which is the longest and finest ranked first at all of the locations but one where it ranked second. In the main, the cottons which gave the highest yarn strength were those possessing the finest fibre and longest fibre, as well as the greatest strength as indicated by the Chandler bundle method. Thus, the variety of cotton planted seems to determine in a large measure the strength of the fibre and the strength of the yarn.

(Textile Research)

FULL-BOBBIN STOP MOTION FOR WEFT FRAMES

As a result of the incorporation of longer traverses and larger creel bobbins on weft frames, Saco-Lowell Shops, 60 Batterymarch St., Boston, has introduced a full-bobbin stop motion for these frames. By its use, uniformly full bobbins are assured at all times; and at the same time spinners and doffers are enabled to attend an increased number of spindles.

In starting the frame after doffing, movement of shipper rod *G* brings collar *E* under latch *D*, which is pressed down by a flat steel spring. Now the builder chain is at its maximum effective length, the ring rail at the bottom of the traverse, and the traverse rod in its extreme position.



Full-Bobbin Stop Motion (Saco-Lowell)

The builder chain winding on the drum causes the ring rail to rise, and block *B* gradually to approach the poker rod *C*. Further gradual movement of block *B* will finally move poker rod *C* sufficiently to raise latch *D*. Thus collar *E* is released so that the powerful compression spring *F* will move the shipper rod *G* in the direction of the arrow. This movement either shifts the drive belt to the loose pulley or opens the motor switch to stop the frame.

The shipper rod is free to move within the coils of the spring *F* and the bore of the sliding collar *E*, so that the full-bobbin stop motion will not be affected by stopping the frame between doffs.

(Textile World)

Something for Nothing!



This in effect is what the Andrew-Langstreth Disc Doubler permits you to obtain. For the same power consumption this twister inserts **two** twists per revolution of the spindle whereas with conventional types of twisting frames only one twist is inserted. The combination of the Andrew-Langstreth twister and the 5/19 Leesona (Reg.T.M.) Winding Machine besides being the most economical is also the most efficient for the production of tyre cords. Actual mill production shows figures which demonstrate that the twister efficiency is 95% and the winding efficiency almost 90%.

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LEESONA



LOOM SPEED AND PULLEY DIAMETERS

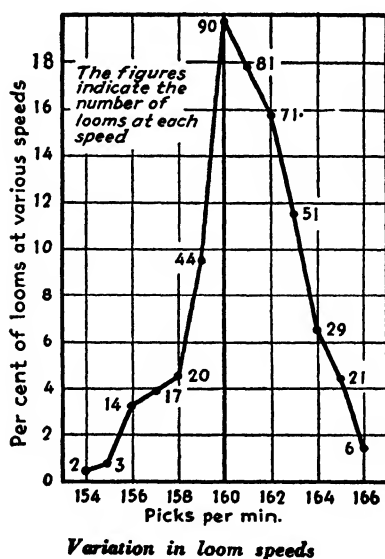
The following is extracted from a recent issue of the *Textile World* :—

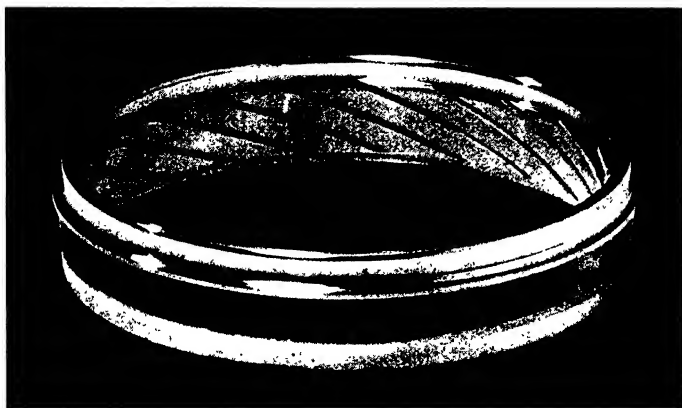
Some overseers of weaving, with looms on lineshafts, blame irregular loom speed on variation in diameter of driving pulley. Believing that other factors influence this variation more than pulley diameters, the superintendent of a large southern mill set out to investigate the problem by means of an exhaustive test. With a speed counter he checked the speeds of 449 looms and 10 driveshafts which operate them. He also measured the diameters of the driving pulleys for variation.

TABLE I

Average speed of looms per shaft

Line-shaft	Picks per min.
1	160.39
2	159.66
3	160.73
4	159.19
5	160.89
6	162.04
7	161.83
8	161.75
9	161.36
10	161.42
Average picks per min. for all looms ..	160.9





MULTIPLE GROOVE RINGS

(PATENT APPLIED FOR)

This new Eadie Ring for grease lubrication offers many of the advantages hitherto only available to users of Eadie Patent Self-oiling Rings—high speeds, long traveller life, light running and 2-3 doffs at one greasing.

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TABLE II
Relation of loom speed to diameter of driving pulley

Loom No.	Picks per min.	Pulley diameter in inches	Oversize in inches	Undersize in inches
1	162	8 47/64	—	1/64
3	162	8 49/64	1/64	—
5	168	8 3/4	—	—
7	168	8 46/64	—	1/32
9	168	8 51/64	3/64	—
11	166	8 46/64	—	1/32
13	162	8 3/4	—	—
15	160	8 3/4	—	—
17	161	8 44/64	—	1/16
19	158	8 44/64	—	1/16
21	160	8 46/64	—	1/32
23	158	8 49/64	1/64	—
25	160	8 47/64	—	1/64
27	152	8 49/64	1/64	—
29	160	8 45/64	—	3/64
31	156	8 50/64	1/32	—
33	164	8 3/4	—	—
35	158	8 45/64	—	3/64
37	160	8 46/64	—	1/32
39	164	8 47/64	—	1/64
41	162	8 3/4	—	—
43	164	8 3/4	—	—
45	160	8 3/4	—	—
47	160	8 46/64	—	1/32
49	165	8 47/64	—	1/32
51	160	8 3/4	—	—
53	165	8 47/64	—	1/64
55	163	8 51/64	3/64	—
262	170	8 51/64	3/64	—
264	170	8 50/64	1/32	—
139	171	8 49/64	1/64	—

Standard diameter of driving pulley 8½ in. Diameter of loom pulley 14 in.

Results of the test showed that 22.1 per cent. of the looms were under the standard speed of 160 picks per minute, 57.7 per cent. were above the standard, and 19.9 per cent. were operating at exactly 160 picks per minute. Average speed of all the looms was 160.92 picks per minute. Pulleys with the same diameters in some instances showed a variation of as much as 13 picks per minute. On the other hand, one pair of looms running within three picks of the same speed had a pulley diameter of $\frac{3}{64}$ in. oversize and $\frac{3}{64}$ in. undersize, respectively—or a total difference of $\frac{3}{32}$ in.

The conclusion reached by the superintendent who made the test is that when checking loom speeds in the future, he can forget about pulley diameters as long as they do not vary too much, and concentrate on other problems, such as belt slippage, lubrication, etc. Details of the test are shown in accompanying charts and tables.

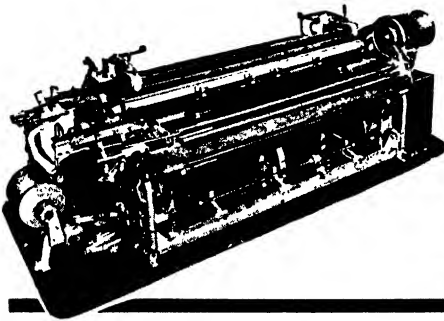
HIGH-SPEED BEAM RAYON WARPING

A rayon beam warping machine known as the new Entwistle high-speed rayon beam warper has recently made its appearance on the British

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market. In American rayon textile factories beam section warping is general practice, and the design of this machine has been developed to meet the needs.

The machine is equipped with SKF ball-bearings throughout and is motor-driven by V-belt and Whitney silent chain and sprockets. The main shaft carries the pressure roller which also serves as a measuring drum, the yardage being recorded by a Veeder-Root predetermined length counter.

The pressure roller bears directly on the beam surface to drive the take-up beam. The latter is mounted on a hinged arm which supports the beam, and control of the pressure between beam and pressure roller is achieved by means of adjustable weights and friction slides working in quadrants.

From a magazine creel the ends are led through the porcelain eyes of an eyeboard condenser and then brought into sheet form by passing over a ball-bearing roller. The eyeboard and sheet roller are mounted away from the machine on an appropriate independent stand. Thence the warp sheet passes in succession through a back comb, an adjustable expansion comb, a warp stop-motion dropper, and then over a breast roller to the beam. An electric warp stop-motion serves to stop the machine within half a turn of the beam when an end breaks, and is coupled also with the yardage counter to stop the machine when a predetermined length has been warped.

The machine is exceedingly simple to operate and all adjustments can easily be made from the front of the machine. Beam doffing is particularly easy, the full beams are lowered to the floor, and being sturdily made with thick flanges, the latter act as wheels, and full beams can be run by hand to a dressing frame or slasher without the trouble of lifting provided a suitable concrete or wooden floor is provided.

The expansion comb is made with specially shaped hardened teeth, and the back or guide comb is fitted with a vibrator motion to minimise the wearing of the comb teeth. An end-and-end leasing device can be incorporated in the machine when desired. All bearings are equipped with Alemite fittings, and there is no possibility of the occurrence of stained or damaged yarn.

Unisel Limited, 60 York Street, Manchester, are the British agents for Entwistle products and will be glad to give further particulars on request.

AUTOMATIC BOBBIN STRIPPING

Messrs. Muschamp Taylor Ltd., Vulcan Works, Pollard Street, Manchester 4, are now offering a machine known as the Stutz automatic bobbin or pirn stripping machine.

The Stutz stripper is by no means a new and untried machine ; some of the leading firms in Great Britain have used it satisfactorily for over two years, while it can be seen in most modern continental sheds.

The machine cleans pirns at the rate of up to 90 per minute. The cleaned bobbins and the removed yarn bunches fall into respective containers.

One operative is sufficient to mind a double-sided machine.

The bobbins are fed into shutles which carry them to the stripping mechanism. This apparatus is so designed that it is impossible to damage the bobbin. Each bobbin is held firmly by the base while the bunch is removed by means of specially designed grippers.

A clock registers the number of bobbins which have been cleaned.

Several types of machines are available to deal with practically every kind of bobbin or pirn ; with cone head or straight, with metal sleeve, plain or grooved, for wood or cardboard, the machine is driven by a $\frac{1}{2}$ h.p. motor.

FRICITION DEVICE FOR SLASHERS

Designed to withstand the heaviest load imposed by larger looms beams now used in many mills is a double friction device for slashers brought out recently by Saco-Lowell Shops, 60 Batterymarch Street, Boston. Embodied in the device is a special multiple-disc friction which is geared to wind the yarn on to the beam at any desired time after the beam has reached 18 in. or more in diameter.

The beam is first started with the standard friction. Then, when desired, the hand-wheel is turned in the opposite direction, bringing the second friction into gear and automatically disengaging the first. The frictions cannot become locked, as tightening one releases the pressure on the other.

With this second friction, the beam is geared to run at one-half of its original speed. This low speed decreases the heat generated and, at the same time, brings into play a mechanism previously in reserve. It is stated that all difficulties of bearings overheating and frictions burning out are thus overcome.

All bearings are anti-friction and are easily accessible. The new friction device may be applied to any Saco-Lowell slasher, except the new high-speed machine.

(Textile World)

FLAT PAPER BOBBIN

A new, hardened and impregnated flat paper bobbin has been placed on the market recently by American Paper Tube Co., Woonsocket, R.I. The bobbin can be furnished with short or long metal ferrule for mechanical or electrical feeler motions. The bobbin is so designed that the periphery of the bobbin is concentric with the hole, assuring a firm, uniform package which will align properly in the shuttle. Since the bobbin is flat on two surfaces, it gives maximum capacity, while well-rounded edges assure smooth, uniform delivery and prevent kinking.

The barrel is made by winding under tension a specially selected paper in successive layers around a steel arbor which corresponds to the spindle

on a winding machine. Each layer is glued into place, assuring uniform thickness of wall within extremely close limits. Later the tube is impregnated and hardened to give added strength, durability and imperviousness to moisture.

Other advantages claimed for the bobbin are long life with full efficiency; light weight; perfect balance; absence of static; high resistance to splintering, chipping, and splitting; a smooth, hard, resilient surface which protects delicate fibres and reduces loom stops, and well-rounded and smooth corrugations which permit the softest yarns to run freely and yet prevent sluffing of hard-twist yarns.

(*Textile World*)

YARN OF VARIABLE COUNT, BUT WITH CONSTANT TWIST FACTOR

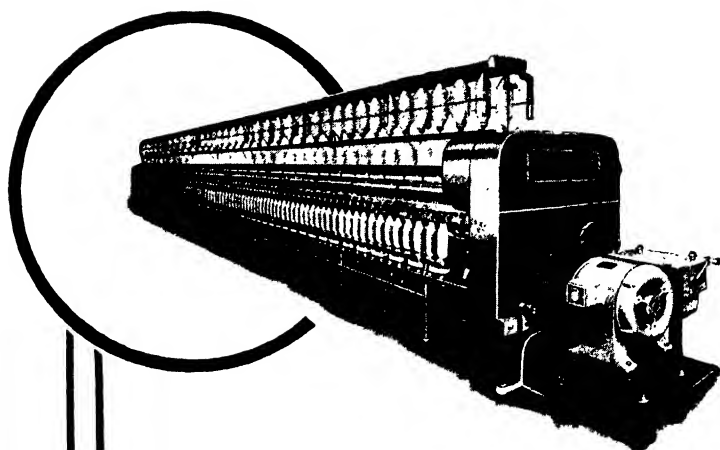
In a recent issue of the *Leipziger Monatsschrift für Textilindustrie* Mr. Ernst Braschler, late of Messrs. Braschler & Cie., spinners and doublers, Wetzikon, Switzerland, describes the production and use of a patented new kind of slub yarn. The following is a short abridgment of the specification mentioned above:—

The peculiar characteristic of the new yarn is the continually changing count, but the twist factor remaining constant throughout. The change of the count can be made at random and also in short length as usually done in slub yarns, but the new yarn distinguishes itself from the usual slub yarn by having not only the count, but also the twist altered, so as to ensure a constant twist factor throughout.

After having made the necessary changes in the gear, the new yarn can be spun on any normal ring frame and spun out of any normal roving of staple material such as wool, cotton, rayon staple fibres, etc. The desired variations of the count are derived from a suitably shaped cam; the additional gear is so constructed so as to control in the same time from the mentioned cam both the driving of the front and back cylinders and thus it assures an exact co-ordination of the two changing factors count and twist.

An example of the yarn with the count varied at random is described in the specification. The repeat extends to about 250 yards, but it can be shortened further or lengthened to 1,000, 2,000 yards and more by altering with a suitable change wheel the driving speed of the cam. Each repeat itself is composed of several different variations of counts; the variations can be made so as to produce any desired effect, that is with shorter or longer slubs, slowly or quickly increasing respectively decreasing and to any proportion of maximum and minimum counts.

The weave resembles in its structure the Shantung or Honan silk weaves; it is just for such imitations that the new yarn could be used with advantage, especially successful also when, e.g., made of rayon staple fibre or cotton which is to be mercerized. With shorter slub effects, the new yarns could allow also the imitation of linen yarn and weaves. But also for printing purposes, the new yarn forms with the described random effect an interesting new and peculiar printer fond.



RING FRAMES

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THE BRITISH COTTON INDUSTRY ENABLING BILL

The British Government has now signified its intention of proceeding with the drafting of an Enabling Bill for the cotton industry. The draft of the Bill will be submitted to the cotton trade some time during the coming autumn.

The Joint Committee of Cotton Trade Organisations recently issued its own estimate of the cost of the proposals :—

After a careful examination the committee has reached the conclusion that the administrative expenses should not exceed £25,000 at the outside. They estimate that the maximum incidence of such a sum on the different sections of the cotton industry should not therefore be greater than 5s. per 1,000 spindles in the spinning section (equivalent to £25 for a normal spinning mill) and 30s. per 100 looms in the weaving section (equivalent to £15 for a mill containing 1,000 looms). It was felt that in the finishing sections it would probably be more convenient to use a percentage of turnover, and the maximum rate should not be greater than one-thirtieth of 1 per cent. For merchants desirous of registering it was suggested that there might be a fee of two or three guineas a year.

The Joint Committee executive has already begun the task of re-examining the proposals in the light of comments received since they were first published, and will meet frequently during the next few weeks to continue discussions on the scheme.

THE QUESTION OF HOLIDAYS WITH PAY IN ENGLAND

The above subject was reviewed again at a recent meeting in Manchester between representatives of the Federation of Master Cotton Spinners' Associations, of the Cotton Spinners' and Manufacturers' Association, and of the Lancashire Cotton Corporation Ltd., representing the employers, and of the Legislative Council of the United Textile Factory Workers' Association representing the operatives.

The whole position with regard to the question of holidays with pay was fully discussed. The employers found themselves unable to go beyond the proposal they made on April 26, to the following effect :—

"We are in general sympathy with the principle of a week's holiday with pay as part of the terms of the contract of employment, but in consequence of the present unsatisfactory state of trade we regret that it is impossible for us to grant your application. We are, however, prepared to meet you again in six months' time for the purpose of reviewing the question in the light of the trading conditions then existing and of the future prospects of the industry."

Following a long discussion, the reply of the operatives was stated to be :—

"We have to express our regret and dissatisfaction with your attitude in refusing our application for a token payment this year and the setting up of a joint sub-committee to make a scheme for holidays with pay."

The employers then suggested that the conference should stand adjourned until October 20, but this was not accepted by the operatives.

SIMPLIFIED WORKING HOURS REGULATIONS IN FRANCE

The proposals of the French Government for simplifying in the interests of national economic recovery, the procedure by which industrial and commercial undertakings are enabled to have recourse to overtime, in order to recover time lost owing to interruptions of work and to deal with unusual pressure of work, have been embodied in a Government Decree dated 24 May, 1938, which was drawn up after consultation with the Standing Committee of the National Economic Council.

Where in an undertaking time is lost owing to collective interruptions of work, other than those due to labour disputes, the time lost may be made up by extensions of working time during the succeeding twelve months, provided that the interruptions and the method to be adopted for recovering the lost time are notified to the Labour Inspector in advance or, in the case of unforeseen interruptions, immediately afterwards. The effect of this provision of the Decree is to introduce the principle of the yearly unit of 2,000 working hours (*i.e.*, the equivalent of 50 weeks each of 40 working hours) in place of a rigid observance of the weekly unit of 40 working hours.

Permission to work overtime of prescribed amount during periods of unusual pressure of business, which, under the regulations hitherto in force, had to be applied for by the undertakings individually, may now be granted in respect of any branch of industry, either for the country as a whole or for a locality, provided that the extra work cannot be dealt with during normal working hours by the existing staff augmented by the engagement of suitable unemployed workers. The permission is to be granted by the Minister of Labour after consultation with the organisations of employers and workers concerned.

The extended working time permissible under the Decree may not be distributed uniformly throughout the year, and may not, as a rule, exceed

the normal working time by more than one hour a day or more than eight hours a week. Employers who avail themselves of the provisions of the Decree may not discharge their regular workers, on account of shortage of work, during the month following the working of extended hours, and must grant priority of engagement to such workers, if discharged after that period, should additional workers of the same occupation be required during a further period of six months. Failure to observe the foregoing conditions will entail the suspension, for not more than one year, of the facilities provided by the Decree. Deviations from the conditions may, however, be authorised by the Minister of Labour in respect of given industries or given undertakings. In the event of acute and prolonged unemployment in any occupation, the provisions of the Decree may be suspended as regards the occupation affected.

(*British Ministry of Labour Gazette, June, 1938*)

A COTTON PLAN IN ALSACE

According to the *Manchester Guardian Commercial*, the Comité de Surveillance et d'Action Economique, of which the Alsatian industrial syndicate and leading textile firms are members, has issued a programme for the reconstruction of the Alsatian textile industry. The industry has become unable to compete even in the home market, and in order to reduce costs of production a renewal of plant and approximation to the standard of the north French textile industry is necessary; the Comité has therefore resolved to recommend the scrapping of part of the machinery of the Alsatian textile industry, in a way similar to what was done in England in 1936 by the Spindles Board with the aid of a Government-guaranteed loan.

The modernisation will cost the Alsatian cotton industry about 120,000,000 francs and the woollen industry about 45,000,000 francs. This is to be raised with the help of an Alsatian lottery and the formation of a company for the provision of medium-term capital advances, and thus without State assistance.

An extensive sales and export organisation is to be set up. The Comité intends to appoint collective representatives to take in hand the organisation of exports for all branches of Alsatian industry. It is also proposed to settle substitute industries in those districts in which unemployment is increased by closing down mills and scrapping plant. Direct assistance is to be given to the Alsatian textile industry by the army administration by giving the Alsatian firms first consideration in the issue of contracts for cloth supplies.

JAPAN

The following is extracted from a recent issue of *Textile and Allied Products*, a publication produced by the United States Department of Commerce :—

The report of the Japan Cotton Spinners' Association showed a total of 12,075,348 spindles installed at the end of October, 1937, an increase of 883,273 since January 1, 1937. For the corresponding period of 1936, the number of spindles in place increased by 598,746. An article in the *Japan Advertiser* of February 18, 1938, stated that the number of spindles installed in mills of seventy-four companies belonging to the Japan Cotton Spinners' Association was 12,296,628 at the end of 1937. If the number of spindles of mills in Chosen belonging to the same association are added, the total is 12,567,290. The article further stated that as a result of governmental restrictions on imports of raw cotton, mills began to use some of their spindles for the manufacture of staple fibre. The number of spindles diverted to staple fibre at the end of 1935 was only 39,984, but by the end of 1937 the figure had increased to 469,328 spindles.

Wages in the Japanese cotton spinning industry moved upward very materially in 1937, the first advance noted for a number of years. The November, 1937, index number of the Department of Commerce for wages in the cotton spinning industry was 112.4, an increase of 11 per cent. over the index for November, 1936. For the eleven months ended November, 1937, the average index number was 108.75, an increase of 8.3 per cent. over the corresponding period of 1936.

A definite improvement in productive efficiency was recorded in 1937; figures for the first ten months of 1937 showed a gain of 3.6 per cent. in average output per working spindle and 3.0 per cent. in production per operative, compared with the output for the corresponding 1936 period when production per working spindle declined by 1.6 per cent. and output per operative decreased 0.5 per cent. from the 1935 average production. It may be noted, however, that efficiency in 1937 still was below that of 1934, the 1937 average production having been 3.8 per cent. lower per working spindle and 0.4 per cent. less per operative than output in 1934.

Consolidated returns of member mills of the Japan Cotton Spinners' Association for the first half of 1937 showed net profits amounting to 18.3 per cent. of paid capital and average dividends of 12.1 per cent., both figures representing new highs for the past eight years. Profits during the second half of 1937 were expected to show a substantial drop as compared with the first six months' returns.

Production of cotton piecegoods by member mills of the Japan Cotton Spinners' Association during 1937 approximated 1,891,000,000 square yards, compared with 1,802,000,000 in 1936. An article published in the *Japan Advertiser* of February 23, 1938, stated that weaving looms belonging to companies associated with the Japan Cotton Spinners' Association numbered 90,381 in 109 mills on June 30, 1937, while looms belonging to firms controlled by the textile federation numbered 259,085 in 5,305 factories. The article also stated that production of companies attached to the Japan Cotton Textile Traders' Guild Federation has declined because most of their members are small-scale concerns, while members of the Spinners' Association are large-scale firms.

It is further stated that the Ministry of Commerce and Industry is proceeding with plans to unify the cotton weaving industry and that most of the leading spinning mills which were concurrently carrying on weaving

would join the Federation in accordance with the new control policy of the Government and that the Federation will virtually control all the cotton textile industry.

It is stated in the Monthly Circular (June, 1938) of the Mitsubishi Economic Research Bureau that, as the voluntary control of cotton yarn supplies and prices by manufacturers has not proved effective, direct official control has become imperative. Official intervention was introduced when the Ministry of Commerce and Industry issued an Order on May 20, 1938 (made effective two days later), on maximum price fixing for cotton yarns. The Order stipulates that cotton yarn cannot be sold at a price exceeding the maximum quotation, which will be made public semi-monthly by the Minister of Commerce and Industry. It is prohibited to sell the commodity (1) under a re-purchase contract with the purpose of obtaining an equivalent profit that might accrue by selling at a price exceeding the maximum quotation, and (2) in any other way. Sales of cotton yarn on condition that delivery should take place five or eight months after sale are also made illegal.

The problem of adjusting the demand and supply of important commodities appointed by the Ministry of Commerce and Industry has so far been considered by manufacturers' bodies organised voluntarily, but the Government, with a view to acquiring more effective results, were authorised on May 25, 1938, by the amended Article II of the Law Relating to the Temporary Measures for Imports and Exports (September, 1937) to give sanction to the Demand and Supply Adjustment Council to be newly organised on the legal basis of the said Article by persons engaged in industries having close connection with the demand and supply of such commodities and to give orders to organise the council when such persons have failed to set it up. The council is to make decisions necessary for adjusting the demand and supply of the commodities and to take measures necessary for putting the decisions into operation. The Government retain the right of ordering the council to make such decisions and forcing members of the council to obey the decisions. It is reported that the Government intend to apply this Article first to the cotton industry.

The Japanese Ministry of Commerce on June 29, promulgated four decrees, effective immediately, prohibiting manufacture of cotton yarns and piecegoods for domestic consumption other than for military purposes.

Advices from Tokyo state the decrees do not affect cotton products for export and will not materially affect Japanese raw cotton imports from the United States, since domestic consumption is comparatively small. Goods for home consumption, must be made of domestic "substitute" materials. The decrees provide for price fixing on all "staple fibre" products.

Simultaneously the Cabinet is invoking, effective about August 1, new sections of the "National Mobilisation Law," providing for control of labour and designed to prevent workers from flocking into the highly paid munitions industries. Employment and wages for skilled and unskilled labour will be subject to fixed control. All workers will be registered and classified as to occupations and qualifications. Graduates of engineering schools and skilled technicians will be allocated among factories as needed.

According to a recent issue of the *Textile Journal of Australia*, the Cotton Spinners' Association in Japan proposes to try and make arrangements to import cotton from the United States without making remittances immediately, and, if possible, to establish a long-term credit over there to finance such imports.

The association has also decided to form a syndicate for the purpose of buying raw cotton in North China. However, it is going to be a difficult problem to get the cotton over to Japan owing to the dislocation of transport. As a result of the lag in exchange permits, the shortage of raw cotton in Japan is now being very keenly felt, and this is partly due to the quota system being enforced two months earlier than was originally intended.

The Japanese Raw Cotton Import Control Association is negotiating with cotton traders in India about the projected import of 60,000,000 yen worth of Indian cotton on deferred payments, and it is expected that an arrangement will be come to without any guarantee by the Japanese Government being necessary. Imports will be made at the rate of 50,000 bales a month, commencing January, and by the end of June cotton to the value of about 40,000,000 yen will have changed hands in this way. Bills will be payable in three months for this, with the option of renewal for a further three months. It seems likely that, owing to the acute shortage of raw cotton in Japan, the import during January will be largely in excess of the monthly figure.

MEXICO

According to advices from Mexico City, a processing tax on cotton is to be levied. The tax is to apply on cotton produced after June 30, 1938, as well as on old crop cotton delivered to cotton mills after June 30, 1938. The rate of the tax is seven pesos per quintal of about 101 lbs. each. Out of the funds collected from this tax, the Government will grant the producers of cotton, as well as cotton manufacturers, the necessary subsidies, the declared purpose of the tax being to stabilise the market, compensating cotton producers in times of low prices and cotton manufacturers in times of high prices.

GERMANY

Plans have been announced and approved for the erection in Plauen (Saxony) of a *hemp cottonising plant* which will have an initial daily production of 6,000 kilograms of cottonised hemp, it is claimed. A hemp decortication plant (to be erected in the hemp-growing section of Germany) will furnish material to the Plauen plant which is expected to begin operations by the end of 1938, according to the local press.

(American Consulate, Dresden)

ARGENTINA

The *Union Obrera Textil* has sent a memorandum to the Government calling attention to present conditions in the textile industry, and requesting the prompt application of anti-dumping measures. At the same time, the manufacturers have drawn up a statement emphasising the importance of the Argentine textile industry in which—including the woollen, cotton, silk, and other branches—there is invested around 500 million pesos. Although progress was made up to mid-1937, there has since been a decided setback owing to circumstances described as abnormal, and at the present time the industry is almost paralysed, the volume of sales having fallen considerably, and factories are working on short time. It is pointed out that imports of textiles during 1937 were no less than 50 million pesos in excess of those in 1936, whilst in the first quarter of the current year there was a further increase of 16½ per cent. This situation the manufacturers claim to be due chiefly to dumping on the part of Japan, made possible by reason of the low wages, longer working hours, and lack of labour laws in that country. Further countries mentioned were Italy and Germany, whose exports were stated to be assisted by means of subsidies, special exchange rates, etc.

(Bank of London and South America)

WAGES IN THE COTTON TEXTILE INDUSTRY IN BOMBAY

(Extracted from the British Ministry of Labour Gazette)

The recently published Interim Report of the Bombay Textile Labour Inquiry Committee, which was appointed by the Bombay Government in 1937, includes the provisional results of a special investigation into the wages paid at July 1937, in the cotton textile industry of the Presidency, which was undertaken by the Bombay Labour Office in order to furnish the Inquiry Committee with up-to-date information on conditions in the industry. The last special investigation of a similar nature related to December 1933, and the results then obtained are reproduced in the Interim Report for purposes of comparison.

The following table shows, for a number of the more important occupations, the average daily earnings (in annas and pies) in the three main centres of the cotton textile industry in Bombay Presidency at December 1933, and July 1937, as ascertained by the Bombay Labour Office investigations :—

Occupation (T=time workers P=piece workers)	Average daily earnings							
	Bombay		City		Ahmedabad		Sholapur	
	Dec. 1933	July 1937*	Dec. 1933	July 1937*	Dec. 1933	July 1937*	Dec. 1933	July 1937*
	a.	p.	a.	p.	a.	p.	a.	p.
Drawing tenters :								
male P.	18	8	15	11	19	11	15	11
female P.	—	—	18	4	15	9	—	—
Slubbing tenters :								
male P.	19	10	17	0	21	11	18	5
female P.	—	—	21	1	17	5	—	—
Inter tenters :								
male P.	19	2	15	6	21	10	17	4
female P.	—	—	17	6	18	1	—	—
Roving tenters :								
male P.	18	4	14	10	19	1†	15	7†
female T. & P.	—	—	19	10	15	8	—	—
Siders, male and female :								
ring siders T. & P.	14	10	13	8	—	—	—	—
single sides T.	—	—	16	10	15	6	10	7¶
two sides T.	—	—	24	0	21	10	—	—
Tarwallas gaiters), male and female T.	13	2	12	11	—	—	8	0¶
Doffers, male and female T.	10	10	10	5	11	7§	10	7§
Weavers, male :								
1 loom P.	—	—	—	—	—	—	12	5
2 looms P.	24	10	21	8	30	11	24	11
Winders, grey :								
male P.	—	—	—	—	12	1	9	11
female P.	11	9†	9	11	10	11	8	5
Winders, colour :								
male P.	—	—	13	11	11	4	—	—
female P.	11	9†	12	8	12	11	10	3
Reelers :								
male P.	—	—	14	11	11	6	—	—
female P.	11	0	8	11	12	2	8	6
All workers (weighted average)	17	2	15	5	22	0||	19	1||

* Provisional figures.

† Combined earnings of grey and colour winders.

‡ Time and piece workers

§ Ring and frame doffers.

|| Including a few occupations not shown in the Table.

¶ Male workers only.

It is pointed out in the Interim Report that the course of earnings in the Bombay cotton textile industry between 1933 and 1937 was considerably influenced by the reduction in statutory working time from 60 to 54 hours a week, which took effect in January, 1935, by the spread of methods of rationalisation, and by changes in the character of the product from coarser to finer types of cloth.

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COLOMBIA

According to a recent publication of the United States Department of Commerce, the cotton textile and apparel industries of Colombia experienced another favourable year in 1937. Production was maintained at nearly full capacity, and the total output is reported to have exceeded 1936 figures by a considerable margin. Demand for goods of domestic production was firm, and the entire output is reported to have been disposed of at profitable prices. Most of the important mills in Colombia found it necessary to increase their capitalization and preparations were made to expand the capacity of nearly every cotton mill. It is estimated that 1,150 looms and 4,000 spindles were purchased during the year, a few of which were installed before the close of 1937. Most of this equipment, however, did not come into operation last year.

Notwithstanding the important advances made in local production of cotton and the expanded spinning facilities, there was a larger demand in 1937 for foreign cotton and unbleached cotton yarn, although imports of bleached and dyed yarns fell somewhat below the volume for 1936. The demand for imported cotton piecegoods was also better than in 1936; although final figures for 1937 were not available at date of writing, estimates based on 11-month statistics indicated that the movement in the more important classes of piecegoods exceeded that of the preceding year by more than 9,000,000 yards.

PERU

BAN ON WEAVING MACHINERY IMPORTS

Under the terms of a law (No. 8677) recently promulgated in Peru the importation of looms, warpers, weavers and machinery in general for weaving, is prohibited for a period of one year beginning June 9, 1938, according to a report to the U.S. Department of Commerce by the office of the American Commercial Attache at Lima. The authorities explain that the law also affects knitting machinery.

It was stated in the bill that Peru now has a sufficient number of looms to satisfy the domestic consumption of textiles and to meet the requirements of exportation to neighbouring countries, and that continued free importation would tend to increase the present excess of textiles.

According to the report, petitions for authorisation to import machinery of this type in case of necessity for established industries or of other considerations of individual interest will not be granted by the executive authorities without prior approval of the Director of Finance, the Lima Chamber of Commerce, and several other official and semi-official organisations.

ROUMANIA

The textile industry in Rumania, although only recently established, has developed rapidly. The industry at the end of 1936

comprised 558 plants representing a capital investment of 6,644,800,000 lei (about \$49,200,000), according to the statistical service of the Rumanian Ministry of Industry and Commerce. The industry employed 61,703 persons and paid salaries and wages totalling 1,415,900,000 lei. (The Rumanian leu-plural lei—was equivalent to about three-fourths of a cent, U.S. currency, in both 1936 and 1937). The textile industry consumed raw materials to the value of 7,260,200,000 lei in 1936 and reported the total value of its output as 11,785,900,000 lei (\$87,216,000).

The number of spindles in the textile industry increased from 35,600 in 1926 to 228,298 in 1936, and the number of looms rose from 3,000 to 10,000.

At the end of 1936, the cotton industry in Rumania is estimated to have had more than 100,000 cotton spindles and 14,500 looms. Domestic production of cotton yarn now covers about 80% of Rumania's requirements of such yarns, but it is expected that after new equipment, already ordered, has been installed (probably by the end of 1938), the country will be self-sufficient in respect to cotton yarn. To encourage domestic spinners, the Government has required cotton manufacturers to purchase 50% of their needs from domestic spinners since October 1937. During the first 9 months of 1937, Rumania imported 22,599,700 kilograms of cotton yarn valued at 1,654,624,000 lei, compared with 14,083,200 kilograms valued at 1,290,631,000 lei in 1936. The greater part of these imports are from the former Austria, Czechoslovakia, Germany, and Great Britain.

The cotton textile industry showed an upward trend in activity during the first half of 1937, but a gradual decline in sales after July led to a reduction in production and an accumulation of stocks.

(United States Dept. of Commerce)

SPAIN

The establishment of a modern textile industry in Andalusia with centres in Sevilla and Granada is reported to have been decided upon by the Nationalist Government. Two thousand looms with an annual output of 15,000,000 metres have already been started up, whilst another concern proposes to commence the operation in the autumn of 20,000 spindles and 400 automatic looms together with dyeing and finishing equipment. There is also talk of the establishment of a staple fibre mill.

In addition to developing the cotton spinning and weaving industry, the Government of Nationalist Spain is reported to be considering other projects, for example, the construction of a large factory to produce cellulose from eucalyptus trees, which are available in considerable quantities in Southern Spain; secondly, the erection of a large mill to produce staple fibre from this cellulose; and thirdly, a factory to work up reed grass as a substitute for jute.

Incidentally, the large textile machinery factories in Northern France are reported to have received very considerable orders recently for diverse textile machines for Nationalist Spain.

(Textile Weekly, Manchester)

U.S. HOURS AND WAGES BILL

Amongst other legislation passed by the U.S. Congress before the latter adjourned on June 16, 1938, was the Wage and Hour Bill, which will become effective the latter part of October, the date depending on when the President signs the Bill.

It provides, among other things, a 44-hour week the first year, 42 hours the second year and 40 hours after the end of the second year. Any employee, regardless of rate of pay, employed more than the specified hours must be paid time and one-half for his employment in excess of the specified hours. Exceptions to this would not ordinarily apply to a cotton mill.

It provides for a 25-cent minimum wage in all industries affected, increasing to 30 cents at the end of the first year.

The Administrator of the Act will appoint an Advisory Committee for each industry. These committees may recommend a higher wage than the 25-cent minimum, but not exceeding 40 cents, any time after the Act becomes effective.

An Industry Committee can recommend a differential of not over 15 cents an hour—that is, the difference between 25 cents and 40 cents. These differentials can be between plants in the same locality, or between cities, states or sections.

The Administrator cannot change the recommendations of the committees, but he can refuse to accept them and appoint another committee to bring in new recommendations. In other words, the Administrator can, for all practical purposes, determine the minimum wage for an industry and decide whether or not differentials shall be allowed.

U.S.A.

MARKING OF COTTON GOODS FOR SHRINKAGE

Trade Practice rules covering shrinkage of woven cotton goods were recently promulgated by the U.S. Federal Trade Commission at Washington.

These rules prohibit certain unfair trade practices considered by the Commission to be unfair methods of competition, unfair or deceptive acts or practices, or other illegal practices and as such will be prevented under laws administered by the commission.

The full text of the rules are quoted below :

" RULE 1—Definition :

" As used in these rules, the term ' residual shrinkage ' applied to woven cotton yard goods in the piece means the shrinkage or shrinking properties remaining in such goods after the same have undergone a shrinking process.

" RULE 2 :

" The practice of selling, offering for sale, advertising, describing, branding, marking, or labelling woven cotton yard goods in a manner which is calculated to mislead or deceive or has the tendency and capacity or effect of misleading or deceiving purchasers, prospective purchasers or the consuming public with

respect to the preshrunk character of such goods, the residual shrinkage remaining therein, or with respect to the extent of the shrinkage to which such goods have been subjected, or respecting any other shrinkage properties, quality, or character of such goods, is an unfair trade practice.

" RULE 3 :

" In the sale or distribution of woven cotton yard goods, it is an unfair trade practice : (a) to use, or cause to be used, directly or indirectly, the terms ' full shrunk,' ' preshrunk,' ' shrunk,' ' shrinkproof,' ' will not shrink,' ' mill shrunk,' ' double shrunk,' ' non-shrinkable,' or word, term, mark, label or representation of like effect or similar import, as descriptive of such goods when the same are not in fact shrinkproof or non-shrinkable, or have not in fact been fully shrunk or preshrunk to the extent that no residual shrinkage is left remaining in such goods, or (b) otherwise to use, or cause to be used, any such word, term, mark, label, or representation so as to mislead or deceive purchasers, prospective purchasers, or the consuming public into the belief that such goods have been shrunk to a greater degree than is in fact true or that the residual shrinkage of such goods is less than is in fact true.

" RULE 4 :

" Nothing in these rules shall prohibit the use of the term ' full shrunk,' ' preshrunk,' ' shrunk,' ' shrinkproof,' ' nonshrinkable,' or word, term, mark, label or representation of like effect or similar import, as descriptive of woven cotton yard goods which have undergone the application of a shrinking process and thereby have been shrunk or preshrunk to the extent that no residual shrinkage is left remaining in such goods, and provided that subsequent to the application of such shrinking process the goods have not been subjected to stretching or to any condition or process which has restored shrinking properties or residual shrinkage to such goods.

" RULE 5 :

" Use of terms ' preshrunk ' or ' shrunk ' with qualifications : (1) In the case of woven cotton yard goods which have undergone the application of a shrinking process and have been shrunk to a substantial extent but as to which there remains a certain amount of residual shrinkage nothing in these rules shall prohibit the use of the term ' preshrunk,' ' shrunk,' or term or word of like effect or similar import, as an integral part of or in immediate conjunction with a truthful phrase, statement, or assertion clearly and unequivocally stating the fact that such goods have been preshrunk or shrunk to a substantial extent and also setting forth in percentage or percentages amount of residual shrinkage remaining in both the warp and the filling, or in the warp or the filling, whichever has the greater residual shrinkage."

WORKING HOURS LEGISLATION IN GERMANY

A revised text of the German Working Hours Order was promulgated by the Federal Minister of Labour on April 30, 1938. It takes effect on January 1, 1939, except in Austria, where the date of operation will be subsequently determined. Apart from the exclusion of the working hours of children and young persons* from the scope of the new Order its provisions do not differ in principle from those of the Working Hours Order dated July 26, 1934. The opportunity has, however, been taken of simplifying the text of the regulations, of removing anomalies and of clarifying points which had been obscure. A summary of the new Order is given below.

* The legislative provisions regulating the employment conditions of children and young persons have been amended and consolidated in an Act dated 30th April, 1938, which also empowered the Federal Minister of Labour to issue the Working Hours Order summarised below.

Scope.—The provisions of the Order apply to male and female manual and non-manual workers of 18 years of age and over,* and to all undertakings and institutions other than those engaged in agriculture, horticulture, forestry, hunting, cattle rearing, fishery and maritime and air transport (except ancillary shore and ground services) and undertakings of an industrial character ancillary to agricultural and forestry undertakings, if working solely on behalf of their primary undertakings. The working hours of the following classes of employed persons are outside the scope of the Order: officials, persons occupying managerial posts, other non-manual workers who are in control of at least 20 members of staff or whose yearly emoluments exceed the limit for compulsory pensions insurance (7,200 RM.), and qualified assistants in chemists' shops.

Normal Working Hours.—The normal working time is fixed in the Order at eight hours a day, exclusive of rest intervals. If the working time is regularly curtailed on certain days of the week, working time on other days in the same, the preceding or the following week may be correspondingly lengthened. An unequal distribution of the weekly working time is permissible also in undertakings in which, in the judgment of the Factory Inspectorate, such a distribution is required by the nature of the work. Time lost owing to works' and national or other public holidays may be made up by extensions of working time during five consecutive weeks. No re-arrangement of working time may, however, involve employment for more than 10 hours on any day, except with the sanction of the Factory Inspectorate.

Extensions of Working Hours.—On preparatory and complementary work which must be performed outside the normal hours of the undertaking, working time may be extended by two hours a day. The total daily working time may not, however, exceed 10 hours, except in cases in which it is impossible to replace one worker by another. The working time of shop assistants may be extended by half-an-hour a day for the completion of the service of customers and for clearing up. Overtime, not exceeding two hours a day, may be worked on 30 days in the year, to be selected by the employer, provided that not more than 10 hours are worked on any one day. Extensions of normal working time to 10 hours a day may be sanctioned by collective labour regulations (or equivalent Orders issued by the competent authority) or, in cases of urgent necessity and for a limited period, by the Factory Inspectorate. When the working hours regularly include considerable periods of waiting for work or when the public interest demands it, extensions of working time to more than 10 hours a day may be sanctioned.

For work on continuous processes which must be carried on for seven days a week, no extension of daily working hours is provided, except that, to permit of a regular weekly change of shift, male workers employed on continuous processes may be required, once in three weeks to work a shift of 16 hours, inclusive of rest intervals; but an uninterrupted rest period of 24 hours must be granted to such workers twice

* Under the Act referred to in the note above, a young person is defined as one who has reached the age of 14 years, but has not yet attained 18 years (formerly 16 years).

during the three weeks. The Factory Inspectorate may, however, sanction a different arrangement.

Rest Periods.—All workers must receive, at the end of the day's work, an uninterrupted rest period of at least 11 hours, or, in hotels and restaurants and the transport industry, 10 hours. Exceptions on grounds of necessity may be sanctioned by the Factory Inspectorate. Male workers employed for a period of more than six hours must be granted a rest interval of half-an-hour or two rest intervals each of a quarter of an hour. The rest periods of women workers are subject to special regulation (*see below*). The working time of shift workers employed on continuous processes in three shifts of eight hours each must be broken by suitable short pauses, which are counted as part of the normal working time.

Emergencies.—The provisions of the Order respecting the limits of working hours and rest periods are not applicable to occasional work necessary in emergencies (especially when danger to raw materials, foodstuffs and other products is threatened), or to the work of a small proportion of the staff who must be employed on particular days on work necessary to prevent damage or loss.

Overtime Payment.—For work in excess of normal hours, other than preparatory or complementary work or work necessitated by accidents or other unavoidable disturbances, an increased rate of payment is prescribed (normally 25 per cent. above the usual wage rates, unless otherwise ordered by the competent authorities or agreed between the parties). Overtime rates are not applicable to extensions of normal hours sanctioned by collective labour regulations or the Factory Inspectorate, if such extended hours regularly include a considerable period of waiting for work. In industries which are regularly subject to considerable seasonal increases of activity, the Federal Minister of Labour may determine that the claim to overtime rates shall lapse in so far as the overtime is balanced by a curtailment of working time during the slack seasons.

Increased Protection for Female Workers.—The normal working hours of female workers of 18 years of age and over are the same as those of male workers of corresponding age. The employment of women is, however, forbidden in certain branches of activity, viz., underground work in mines, the transport and loading of mine products, work at coke ovens, and the transport of materials on building operations. The Federal Minister of Labour may, moreover, forbid, or impose conditions upon, the employment of women on work involving special danger to health and morals. During pregnancy and lactation, women workers may at their own request be exempted from work in excess of normal hours. On preparatory and complementary work, women may not be employed for more than one additional hour a day. When the period of work exceeds $4\frac{1}{2}$ hours, women workers must be granted rest pauses varying in total duration from 20 minutes to one hour according to the length of the working period, and they may not be employed for longer than $4\frac{1}{2}$ consecutive hours without a rest pause.

Except in the transport industry, hotels, and restaurants, hospitals,

theatres, etc., female manual workers may not normally be employed between 8 p.m. and 6 a.m., or, in undertakings in which multiple shifts are worked, between 11 p.m. and 6 a.m.

The provisions regulating the working hours and rest periods of women may be modified, on general or particular grounds of necessity, by the Federal Minister of Labour or the Factory Inspectorate, and they are not applicable to occasional work during emergencies.

General Provisions.—The Federal Minister of Labour may authorise exceptions additional to those provided in the Order, if urgently necessary in the public interest. Infractions of the provisions of the Order are punishable by fine or imprisonment. Undertakings which fail to comply with Orders curtailing working hours in dangerous occupations or restricting the employment of women may be temporarily closed by the Factory Inspectorate. The execution of the requirements of the Order is, in general, subject to the supervision of the Factory Inspectorate, the mining authorities, and, as regards the closing of shops the local police.

(The British Ministry of Labour Gazette)

HOLIDAYS WITH PAY IN THE AUSTRALIAN TEXTILE INDUSTRY

The legal right of Australian workers to holidays with pay was extended to the textile industry by an award of the Commonwealth Court of Conciliation and Arbitration which came into force from the first pay period in January, 1938.

The award provides for a holiday on full pay from December 25 to January 1 inclusive, with payment for the public holidays falling on working days. In substance the change effected by the award means payment for two holidays in addition to the number previously provided for. In consequence of the new provision, most employees will reap the benefit of a clear week's holiday on full pay at the time of year when it will be most appreciated. Employees compelled to work during the Christmas to New Year period will be entitled to a week's holiday on full pay during each year.

(Industrial and Labour Information, published by the International Labour Office)

NIGHT SHIFTS IN COTTON MILLS

At the beginning of April, 1938, there were fifty-three mills in Bombay City and sixty-two in Ahmedabad working night shifts. The numbers of men doing night work were 50,175 and 39,415 respectively.

COTTON TRADE STATISTICS

INTERNATIONAL TRADE IN COTTON

(Extracted from Foreign Crops and Markets)

World cotton exports during the first 8 months of the current season were more than 1 million bales less than those of the corresponding months last season. Practically all the decline was due to a drop in British Indian exports, principally those to Japan. An 8% rise in United States cotton exports more than made up for slight declines in those of Egypt, Brazil, and Argentina. The United States supplied 62% of the total, compares with 50% a year ago.

United States: In the 8-month period under review, the United States exported 385,000 bales more than during the corresponding period last year. Japan reduced purchases of American cotton from 1,295,000 bales in 1936-37 to 454,000 bales so far this season; but this decline was more than offset by the increased shipments to other markets, especially those of Europe. The United Kingdom, our most important outlet, took 1,484,000 bales, a gain of 483,000 bales over a year ago and 30% of total United States' cotton exports. Italy purchased 438,000 bales, 152,000 bales more than a year earlier. Germany increased purchases by 111,000 bales.

British India: Exports from British India dropped to 1,006,000 bales the smallest since the close of the World War. Exports to all principal importing countries were under those of the preceding year. Japan took only 390,000 bales compared with 1,334,000 bales last season.

Egypt: Exports from Egypt amounted to 1,306,000 bales compared with 1,440,000 bales a year earlier, a decrease of 9%. Smaller exports to Japan were the principal explanation of this decrease. Exports to the United Kingdom, the United States, and Czechoslovakia were also under those of a year ago; but those to several European countries were increased.

Brazil: In the 7 months ended February 28, 1938, exports from Brazil differed little from those of last season but, with the new crop (estimated at the all-time peak of 2,205,000 bales) beginning to arrive on the market, exports may show an increase.

Peru and Argentina: Peru exported 197,000 bales, approximately the same as last season. Due to a short crop, exports from Argentina dropped to 15,000 bales, one of the lowest on record.

COTTON TRADE STATISTICS

COTTON: Destination of exports from the principal exporting countries, average 1923-24 to 1932-33 and seasons 1935-36 to 1937-38(a).

Destination of exports from principal exporting countries	Quantity				Percentage of total			
	Average 1923-24 to 1932-23	1935-36	1936-37	1937-38	Average 1923-24 to 1932-33	1935-36	1936-37	1937-38
<i>Exports from the</i>	1,000	1,000	1,000	1,000				
<i>United States to</i>	<i>bales</i>	<i>bales</i>	<i>bales</i>	<i>bales</i>	<i>Per cent.</i>	<i>Per cent.</i>	<i>Per cent.</i>	<i>Per cent.</i>
Germany	1,538	663	525	636	23	13	11	13
United Kingdom ..	1,504	1,129	1,002	1,484	23	22	22	30
France	747	619	651	726	11	12	14	15
Italy	545	301	286	438	8	6	6	9
Spain	240	183	(b)	0	4	4	(c)	0
Belgium	156	150	141	172	2	3	3	3
Netherlands ..	116	60	77	108	2	1	2	2
U.S.S.R.								
(Russia) (d)	88	0	1	(b)	1	0	(c)	(c)
Sweden	49	67	72	78	1	1	2	2
Portugal	34	47	30	31	1	1	1	1
Poland and Danzig	15	215	151	184	(c)	4	3	4
Other Europe ..	49	79	90	205	1	2	2	3
Total Europe ..	5,081	3,513	3,026	4,062	77	69	66	82
Canada	155	197	215	195	2	4	5	4
Japan	1,065	1,274	1,295	454	16	25	28	9
China	223	34	13	11	4	1	(c)	(c)
British India ..	63	7	8	147	1	(c)	(c)	3
Other countries ..	14	33	39	112	(c)	1	1	2
Total	6,601	5,058	4,596	4,981	100	100	100	100
<i>British India to</i>								
Japan	900	954	1,334	390	50	52	57	39
Italy	201	66	124	66	11	4	5	7
China	178	38	8	48	10	2	(c)	5
Germany	123	163	107	87	7	9	5	9
Belgium	121	126	191	80	7	7	8	8
United Kingdom ..	111	253	327	154	6	14	14	15
France	88	95	85	47	5	5	4	5
Spain	37	38	(b)	(b) (c)	2	2	(c)	(c)
Netherlands ..	24	26	32	(c) 16	1	1	1	2
Other countries ..	32	91	120	118	1	4	6	10
Total	1,815	1,850	2,328	1,006	100	100	100	100
<i>Egypt to</i>								
United Kingdom ..	432	442	503	434	40	34	35	33
France	140	179	159	180	13	14	11	14
United States ..	127	43	51	29	12	3	4	2
Germany	76	117	105	150	7	9	7	11
Italy	72	74	71	86	7	6	5	7
Japan	50	81	194	55	5	6	13	4
Switzerland ..	48	42	60	62	4	3	4	5
Spain	35	71	0	1	3	6	0	(c)
U.S.S.R.								
(Russia)	33	(f)	(f)	(f)	3	—	—	—
Czechoslovakia ..	22	50	55	42	2	4	4	3
British India ..	17	49	70	101	2	4	5	8
Poland and Danzig	9	26	24	29	1	2	2	2
Other countries ..	26	108	148	137	1	9	10	11
Total	1,087	1,282	1,440	1,306	100	100	100	100
<i>Brazil to</i>								
Germany		166	169	265		50	31	48
United Kingdom ..		85	189	131		26	34	24
Japan		6	66	56		2	12	10
France		24	26	27		7	5	5
Portugal		7	12	19		2	2	4
Belgium-Luxem. ..		20	16	15		6	3	3
Poland		3	12	9		1	2	2
Netherlands ..		15	15	8		4	3	1
Italy		6	30	4		2	5	1
Other countries ..		(b)	14	15		(c)	3	2
Total	(g) 71	332	549	549	100	100	100	100

Compiled from official sources.

(a) Bales of 478 lb. net except for the United States which are in bales of 500 lb. gross.
 (b) Less than 500 bales. (c) Less than 0.5%. (d) Beginning January 1, 1935, includes Russia in Asia. (e) Seven months, August-February. (f) If any, included in "Other countries."
 (g) No data available by countries.

COLOMBIA

Imports of various textile items in 1937, according to preliminary returns were as follows (details by countries not yet available) :

Item		Quantity in various units	Weight in net kilos	Value in pesos
Cotton drill	Yards	10,082,730	1,839,996	3,727,700
Cotton prints	"	34,697,094	2,056,783	5,587,200
Cotton and silk or rayon mixtures ..	"	166,858	17,930	133,564
Cotton gloves	Dozens	2,603	2,071	51,599
Cotton hosiery	"	321,857	105,225	662,668
Cotton yarns, dyed	"	—	111,862	250,871
Cotton yarns, unfinished	"	—	1,375,734	1,536,110
Wool yarns, dyed	"	—	663,433	1,849,418
Wool yarns, unfinished	"	—	68,577	268,683
Wool piecegoods, meters	"	1,321,274	585,450	3,849,874
Silk and rayon yarns	"	—	792,654	1,588,848
Silk and rayon hosiery	Dozens	76,887	18,604	643,893
Silk and rayon piecegoods	Yards	1,144,388	95,610	448,447
Total of items listed			7,733,929	20,592,875

Colombia's imports of "Textiles and manufactures" in 1936 amounted to 11,852,000 kilograms valued at 28,277,538 pesos, compared with 12,720,000 kilograms valued at 27,324,042 pesos in 1935, according to the Pan American Union's Foreign Trade Series for Colombia (No. 162). Kilogram=2.2046 lb.; peso equivalent to about \$0.55, U.S. currency, at controlled rates of exchange in both years.

(U.S. Dept. of Commerce)

PERU

The value of imports of various categories of textiles during 1936 and 1937 was reported as follows (Peruvian sol equivalent to about one shilling in both years) :

Category	1936 (Values in Peruvian sols)	1937
Cotton manufactures	17,283,465	15,748,195
Wool manufactures	6,178,243	5,938,965
Manufactures of linen, hemp, and jute ..	(Not reported)	5,878,704
Silk and rayon manufactures	" "	4,060,849

In cotton manufactures, imports of cloth and trimmings decreased while receipts of yarn and articles of clothing increased slightly. In wool manufactures, the decline was also in cloths and trimmings. Jute manufactures were slightly higher in value than in 1936, owing to heavy imports of jute bags. The most of the imports in the silk and rayon category represents rayon yarn imported for the expanding rayon-weaving industry; the 1937 importation was a new record in this category.

(U.S. Dept. of Commerce)

GREAT BRITAIN

COTTON YARN EXPORTED FROM THE UNITED KINGDOM
Per Board of Trade Returns. (In lbs.)

To	Six months ended June 30.			
	Grey Unbleached.		Bleached and Dyed.	
	1938	1937	1938	1937
Eire	2,306,800	1,903,500	586,500	794,700
British West Africa	38,200	42,600	214,900	1,165,400
Union of South Africa	1,349,100	1,819,700	79,100	61,700
British India—				
Bombay <i>via</i> Karachi	25,100	37,100	62,200	76,300
" " Other Ports	330,500	649,900	45,700	143,200
Madras	214,000	446,500	573,600	1,627,900
Bengal, Assam, Bihar and Orissa	1,619,200	802,400	100,100	124,100
Burma	4,600	—	124,700	172,900
Total (British India)	2,193,400	1,935,900	906,300	2,144,400
Hong Kong	958,500	879,500	19,000	99,100
Australia	1,915,700	1,539,900	1,828,900	1,066,300
Canada	1,804,100	2,374,800	171,400	244,400
Other British Countries	400,900	407,000	201,900	208,700
Finland	452,800	724,900	61,700	44,100
Lithuania	1,445,100	1,787,300	27,200	30,800
Sweden	2,009,300	3,144,800	110,100	172,700
Norway	1,479,300	2,855,800	81,800	77,300
Denmark	1,178,700	1,915,700	155,800	207,900
Poland	1,134,700	1,321,300	49,600	23,700
Germany	16,359,300	16,666,400	12,900	22,600
Netherlands	5,283,900	14,045,900	99,400	150,800
Belgium	1,248,200	3,007,200	52,400	62,100
France	280,300	1,168,600	27,300	35,000
Switzerland	382,800	2,627,800	5,500	15,600
Italy	19,900	16,700	1,400	—
Austria	187,900	490,300	9,400	18,400
Czechoslovakia	365,900	564,200	1,300	3,400
Yugoslavia	562,400	592,000	128,100	244,000
Greece	205,300	245,800	92,500	144,200
Bulgaria	196,000	510,600	141,500	141,500
Roumania	2,168,200	4,172,500	16,700	134,900
Turkey	541,300	508,800	16,000	85,300
China	190,500	314,000	10,100	47,700
Japan	124,100	529,500	—	5,900
United States of America	232,700	669,700	59,300	176,800
Brazil	712,400	626,600	16,900	14,200
Uruguay	1,318,900	1,362,000	189,800	67,800
Argentine Republic	1,991,300	2,131,000	414,700	517,600
Other Foreign Countries	3,458,900	2,713,400	640,200	921,000
TOTAL				
Up to No. 26 count	17,502,700	20,104,700	2,885,400	3,394,100
Over No. 26 count and up to No. 40 count	13,856,500	22,268,700	1,603,800	2,577,300
Over No. 40 count and up to No. 80 count	16,155,200	22,659,400	1,520,600	2,438,600
Over No. 80 count and up to No. 120 count	5,987,500	9,325,300	349,800	587,600
Over No. 120 count	994,900	1,257,600	70,000	152,400
Total	54,496,800	75,615,700	6,429,600	9,150,000

COTTON MANUFACTURES EXPORTED FROM THE
UNITED KINGDOM—(In Square Yards.) 000's omitted.

Per Board of Trade Returns

To	Jan./June inclusive.	
	1938	1937
Eire	14,297	19,887
Palestine	899	1,290
British West Africa—		
Gambia	201	2,002
Sierra Leone	2,081	7,431
Gold Coast	3,163	19,057
Nigeria	15,385	58,695
Total (British West Africa)	20,830	87,185
Union of South Africa	51,559	66,904
Southern Rhodesia	7,191	8,316
British East Africa	3,682	3,690
Anglo-Egyptian Sudan	906	758
Aden and Dependencies	1,514	2,327
British India—		
Bombay <i>via</i> Karachi	54,513	74,398
" " Other Ports	41,387	45,540
Madras	8,476	16,257
Bengal, Assam, Bihar and Orissa	39,333	43,736
Burma	11,306	17,554
Total (British India)	155,015	197,485
British Malaya	25,159	21,936
Ceylon	9,689	14,053
Hong Kong	4,331	1,830
Australia	77,504	73,895
New Zealand	12,124	16,613
Canada	30,828	38,839
British West India Islands	9,424	14,445
British Guiana	1,487	2,674
Other British Countries	8,591	7,477
Finland	3,914	4,842
Latvia	1,917	2,562
Lithuania	2,901	4,023
Sweden	9,353	11,786
Norway	8,332	11,934
Denmark	23,290	28,417
Germany	13,756	15,975
Netherlands	5,330	18,227
Belgium	2,827	5,668
France	729	1,951
Switzerland	7,285	27,358
Portugal	1,268	1,776
Italy	1,710	1,018
Austria	716	1,420
Yugoslavia	1,371	1,405
Greece	7,373	8,978
Roumania	335	1,480
Turkey	6,933	7,344
Syria	1,814	2,247
Egypt	19,465	26,062
Morocco	990	1,563
French West and Equatorial Africa	3,262	16,199
Belgian Congo	1,116	2,105
Portuguese East Africa	3,199	4,190
Iraq	3,303	4,293
Iran	1,532	2,558
Dutch East Indies	12,905	25,109
Philippine Islands	1,235	1,513

U.K. EXPORTS OF COTTON MANUFACTURES—*continued.*

To	Jan./June inclusive	
	1938	1937
China	1,816	3,019
United States of America	4,554	7,711
Cuba	4,997	7,515
Mexico	1,006	2,075
Guatemala	1,963	3,545
Salvador	1,361	3,602
Colombia	19,544	32,255
Venezuela	8,046	12,859
Peru	2,938	3,128
Chile	3,862	4,135
Brazil	326	479
Uruguay	3,548	4,286
Argentine Republic	52,127	54,000
Other Foreign Countries	15,517	20,579
Total	704,796	980,775
Total of Grey, Unbleached	114,078	167,021
Total of White, Bleached	208,834	297,479
Total of Piecegoods, Printed	140,712	206,119
Total of Piecegoods, Dyed or Manufactured of Dyed Yarn	241,172	310,156
Total of Piecegoods of all kinds	704,796	980,775

EXPORTS OF PIECEGOODS FROM THE UNITED KINGDOM
CONTAINING ARTIFICIAL SILK AND COTTON

Per Board of Trade Returns

Manufactures, except apparel, either wholly of artificial silk (including staple fibre and waste), or of artificial silk mixed with other materials except silk—	Jan./June inclusive	
	1938	1937
Pile fabrics, damasks, tapestries, brocades and the like Sq. Yds.	987,391	988,615
Lace and lace net of all kinds, and material which resembles such lace or lace net.. Lbs.	563,774	701,359
Other tissues (except ribbons)—		
Wholly of artificial silk (including staple fibre and waste)—		
To Eire Sq. Yds.	1,436,484	1,519,202
Union of South Africa	2,410,661	1,874,747
Australia	3,214,532	6,234,863
New Zealand	1,881,498	1,828,322
Other British Countries	3,729,457	4,671,004
Foreign Countries	2,337,922	1,822,853
Total	15,010,554	17,950,991
Of artificial silk or staple fibre mixed with other materials except silk—		
To Eire Sq. Yds.	1,047,510	1,127,652
Union of South Africa	2,253,748	3,168,543
British India	281,787	447,496
Australia	2,653,020	3,124,167
New Zealand	605,434	1,050,061
Canada	935,167	1,140,593
Other British Countries	2,358,716	3,648,793
Denmark	1,311,350	1,312,229
Netherlands	236,993	353,588
Argentine Republic	438,743	514,062
Other Foreign Countries	2,696,269	2,438,291
Total	14,818,737	18,325,575

BRAZIL (Sao Paulo)

Cotton shipped from Santos to foreign countries—Total shipped, 1936-37 crop, March, 1937, to February, 1938.

Shippers	Bales	Kgs.	Value
Algodoeira do Sul Limitada ..	118,156	21,039,541	96,889:898 \$600
Soc. Algo. do Nor. Brasileiro ..	117,400	20,895,150	84,674:925 \$800
Anderson, Clayton & Cia., Ltda. ..	110,400	20,354,522	85,443:539 \$187
Companhia Prado Chaves ..	79,188	13,952,380	54,826:800 \$000
S/A.C.E.I.L. Dreyfus & Cia., Ltda. ..	70,618	12,201,141	48,464:657 \$715
Exp. de Productos Brasileiros S/A. ..	43,720	7,667,843	30,164:936 \$300
Dixon Irmãos & Cia., Ltda. ..	28,234	4,996,220	19,958:957 \$800
McFadden & Cia., Limitada ..	26,930	4,735,003	19,174:502 \$600
S/A. Fabrica Votorantim ..	26,334	4,597,341	18,205:310 \$200
Cia. Brasileira de Fructas S/A. ..	22,916	4,406,798	16,897:783 \$100
Brazcot Limitada	20,525	3,685,522	15,252:111 \$727
S/A. I.R.F. Matarazzo ..	19,676	3,547,467	14,656:367 \$600
Naumann Gepp & Cia., Ltda. ..	18,586	3,242,032	12,352,620 \$400
Esteve Irmãos & Cia., Ltda. ..	14,941	2,624,890	8,540:910 \$000
Alm. Prado, Assumpção & Cia., Ltda. ..	14,758	2,623,249	9,776:935 \$100
Braz. Warrant Ag. & Fin. Co. Ltde. ..	15,055	2,622,919	9,643:722 \$200
Soc. Nacional Exportadora ..	12,495	2,267,696	9,195:427 \$200
Cia. Paul. de Comm. e Exportação ..	12,011	2,151,238	9,450:896 \$700
A. Prado & Cia., Limitada ..	11,837	2,075,716	8,525:780 \$700
Pape Williams & Cia., Ltda. ..	11,073	1,955,937	7,136:122 \$100
Divs. p/c. José Guarino ..	9,939	1,737,984	5,255:271 \$697
L. Fig.° p/c. E. Wissmann ..	9,740	1,677,970	7,213:998 \$400
L. Fig.° p/c. Van Rees do Brasil Ltda. ..	8,628	1,517,621	6,866:928 \$200
Soc. Technica Bremensis Ltda. ..	7,051	1,309,143	4,536:030 \$000
Esc. Irmãos Assumpção ..	6,020	1,083,602	4,407:445 \$100
S/A. Wharton Pedroza ..	6,022	1,020,486	3,549:854 \$000
T.F. Bush & Cia., Ltda. ..	4,827	843,993	3,313:859 \$500
Divs. p/c. Soc. Comm. de Alg. Ltda. ..	4,714	819,378	2,721:662 \$200
Nishitani & Cia., Limitada ..	4,363	745,260	3,412:615 \$900
L. Siegrist	3,518	611,755	2,227:582 \$600
Cia. Comm. Paul. de Café ..	3,137	542,237	2,434:779 \$800
Renato Marelli	2,569	466,867	1,546:691 \$400
Divs. p/c. J. Nunes & Cia. ..	1,438	249,399	844:038 \$738
Compalbra Limitada ..	1,160	193,565	761:625 \$520
Alg. do Sul p/c. P. Salgado & Cia. ..	560	101,159	427:323 \$500
Orlando Franca & Cia., Ltda. ..	498	88,742	282:400 \$200
Exportadora Rubiac ..	390	68,049	329:582 \$200
Vidal & Cia.	370	67,889	303:013 \$300
Industrial de Algodão Ltda. ..	251	44,904	209:980 \$700
A. Joppert p/c. S/A. Ped. Joppert ..	232	44,778	220:290 \$700
H. S. Vargas	191	34,343	154:833 \$800
Alg. do Sul p/c. Souza Pimentel & Cia. ..	191	33,000	136:758 \$400
José Ferreira & Filhos ..	133	21,915	73:839 \$000
Moraes Barros & Cia., Ltda. ..	87	15,347	50:013 \$196
L. Fig.° p/c. F. Dubois Kohne ..	68	11,799	50:911 \$141
Albrecht, Muller-Pearse & C.° Ltde. ..	65	11,415	52:496 \$100
Hypopolito Vargas	66	10,959	48:443 \$900
Total	871,090	154,916,184	630,665:483 \$421

The exports of cotton from the State of Sao Paulo for the years 1936 and 1937 were classed into the various staple lengths and types by Government classifiers as follows :—

COTTON TRADE STATISTICS

1936			1937		
Staple Length	Kilos	Percent- age	Staple Length	Kilos	Percent- age
Below 22 mm.	10,593	0.00	Below 22 mm.	102,967	0.06
22/24 mm.	—	—	22/24 mm.	—	—
24/26 "	—	—	24/26 "	—	—
26/28 "	123,638,346	86.96	26/28 "	140,247,121	83.98
28/30 "	11,881,031	8.36	28/30 "	16,844,074	10.09
30/32 "	92,052	0.06	30/32 "	53,651	0.03
32/34 "	350,832	0.25	32/34 "	—	—
34/36 "	—	—	34/36 "	—	—
36/38 "	—	—	36/38 "	—	—
Mixed	25,853	0.01	Mixed	3,508	0.00
Remainder including Linters	6,187,822	4.34	Remainder including Linters	9,758,737	6.84
Total ..	142,186,529		Total ..	167,010,058	

1936			1937		
Types	Kilos	Percent- age	Types	Kilos	Percent- age
1	—	—	1	—	—
2	266,093	0.18	2	81,215	0.04
3	11,110,060	7.81	3	4,986,295	2.98
4	42,461,306	29.87	4	24,693,399	14.79
5	50,225,734	35.33	5	52,440,792	31.40
6	23,523,763	16.55	6	47,993,607	28.74
7	5,953,914	4.18	7	20,413,127	12.23
8	1,905,831	1.34	8	5,317,483	3.19
9	364,814	0.25	9	973,479	0.58
Unclassifiable	187,192	0.13	Unclassifiable	351,924	0.21
Remainder including Linters	6,187,822	4.34	Remainder including Linters	9,758,737	5.84
Total ..	142,186,529		Total ..	167,010,058	

JAPANESE PRODUCTION OF COTTON YARN
AND PIECEGOODS

Year and Month	Cotton Yarn† bale	Rayon Yarn‡ case	Cotton textile*		Cotton† Piecegoods 1,000 sq. yds.	Silk-Cotton Mixed Textiles*	
			Broad Width metre	Narrow Width piece		Broad Width metre	Narrow Width piece
1935	3,560,837	2,010,315	3,811,718,463	113,034,685	1,843,469	4,278,844	1,866,844
1936	3,807,463	2,618,251	3,618,936,769	112,454,991	1,802,401	4,271,345	2,487,015
1937	3,967,407	3,247,496	3,803,666,527	106,448,118	1,894,299	4,573,802	2,201,820
1937 Jan. ..	326,126	252,608	296,595,348	8,870,165	154,463	435,001	224,286
Feb. ..	329,822	255,849	293,290,597	7,953,186	159,447	410,285	162,146
March ..	325,890	264,652	301,808,430	9,783,624	157,384	445,478	224,784
April ..	337,804	269,280	314,141,013	10,002,400	160,543	365,709	219,420
May ..	334,942	279,591	324,792,349	10,037,942	160,233	366,836	160,043
June ..	341,461	275,794	327,818,710	9,131,866	160,806	457,504	146,811
July ..	358,387	294,076	325,317,292	8,364,271	157,441	508,220	160,135
Aug. ..	359,796	295,794	316,405,902	7,135,858	156,247	248,029	84,095
Sept. ..	349,846	270,001	313,141,909	8,463,630	159,410	369,571	203,552
Oct. ..	336,900	285,548	335,873,461	9,242,055	159,563	438,144	217,115
Nov. ..	332,598	275,909	331,470,728	8,540,401	156,940	295,570	209,637
Dec. ..	273,835	231,594	315,156,640	8,921,056	151,816	341,255	105,205
1938 Jan. ..	249,041	210,328	287,672,562	9,164,777	148,427	471,337	148,233
Feb. ..	204,979	209,034	260,384,356	10,387,546	132,748	303,930	98,856

Source

* Dept. of Commerce and Industry, Tokio. † Spinners' Association. ‡ Rayon Association.

GEOGRAPHICAL DIVISION OF EXPORTS OF AMERICAN COTTON

To Week Ending Friday, July 8, 1938

	Since August 1 This Season	Since August 1 Last Season
Great Britain	1,602,545	1,184,892
France	752,433	707,521
Germany	888,548	738,231
Holland	135,249	124,087
Belgium	200,034	162,799
Russia	—	400
Denmark	68,698	58,159
Norway	10,602	11,647
Sweden	83,280	82,114
Portugal	26,960	25,320
Spain	278	—
Poland	251,931	175,887
Italy	557,265	420,850
Greece	—	—
Japan	661,662	1,560,573
China	47,694	23,635
Manchukuo	37,932	—
British Columbia	16,223	10,594
Finland	13,956	11,105
India	143,238	12,887
South Africa	2,522	1,082
Porto Rico	—	1
South America	16,500	9,296
Cuba	7,863	5,883
Bulgaria	250	—
Latvia	797	1,761
Netherlands	—	830
Philippine Islands	1,018	423
Australia	10,843	2,382
Estonia	3,073	3,050
New Zealand	7	—
Canada	249,399	297,638
Jugo-Slavia	600	850
Czechoslovakia	260	—
Total	5,791,660	5,643,897

WORLD STAPLE FIBRE PRODUCTION

World staple fibre production in 1937 is estimated by *Rayon Organon* at 622,900,000 lb., of which Germany is credited with 220,000,000 lb., Japan with 174,800,000 lb., and Italy with 156,400,000 lb. This country's output was only 20,100,000 lb.

MISCELLANEOUS

RAYON STAPLE FIBRE—A SHORT CUT TO SELF-SUFFICIENCY

The monthly report of the National City Bank of New York for June, 1938, contained the following :—

The production and use of rayon in the textile industries of the world made another phenomenal gain in 1937. Consumption of continuous filament rayon yarns increased over the previous year, as it has in almost every year since the beginning of the industry. The greatest gain, however, was the extraordinary increase in "staple fibre," which is rayon cut into short lengths for subsequent spinning into yarns on cotton, woollen, or worsted spinning machinery.

As will be seen from the following table, the world production of staple fibre was more than 600 million lbs. in 1937, compared with 300 million the year before, and 140 million in 1935. In 1932, staple fibre production at 21 million lbs. amounted to less than half of 1 per cent. of total world rayon production; in 1937 it reached 34 per cent., and if German and Japanese plant capacity comes up to present plans, staple fibre may approximate one-half of the world rayon output in 1938.

WORLD RAYON AND STAPLE FIBRE PRODUCTION
(000,000 lbs.)

			Rayon Filament Yarn					
Year			Japan	U.S.	U.K.	Germany	Italy	France
1913	..	..	—	2	7	8	—	3
1922	..	..	1	24	15	11	7	7
1929	..	..	27	121	53	58	71	42
1932	..	..	70	135	70	55	62	51
1934	..	..	153	208	88	85	86	57
1935	..	..	224	258	111	98	86	62
1936	..	..	275	278	118	99	86	60
1937	..	..	334	312	120	125	107	66
			Total					
								25
								77
								435
								515
								772
								939
								1,021
								1,187

			Staple Fibre					
Year			Japan	U.S.	U.K.	Germany	Italy	France
1932	..	..	1	1	2	6	9	2
1934	..	..	5	2	3	16	22	4
1935	..	..	14	5	10	38	68	5
1936	..	..	46	12	26	95	110	6
1937	..	..	175	20	35	220	156	11
								622

Source : Textile Economics Bureau, Inc.

No other synthetic product, competing with a natural commodity, has ever approached this record of growth. It is one of the most striking of all the examples of the endless change that takes place in the industries and in trade, through the introduction of new products and new methods, growing out of scientific experiment and progress.

THE NEW FIBRE AND ITS ADAPTABILITY

Since staple fibre is chemically the same as rayon filament yarn, there can be as many types of staple fibre as there are of filament ; lustrous and delustred yarn, coarse and fine denier, viscose, acetate, and cuprammonium. The fibres drawn from the jets are cut either " wet " while still in the coagulating bath, and then washed and bleached ; or " dry " rayon filaments, already washed and bleached are chopped into desired staple lengths. The product is marketed in bales, like cotton. Certain production operations have been shortened and filament jets of 3,000 and more holes installed ; in continuous filaments only 20 to 225 hole jets are used. This is the chief reason for the considerable price difference. A pound of viscose rayon staple fibre sells, for example, at 25 cents, while the viscose yarn costs 49 cents.

The use of rayon in the form of short staple is by no means new. Germany mixed chopped rayon in textile fabrics in the last years of the World War. Waste rayon has been bought by American spinners, cut into short lengths and spun since the end of the war. But the product was at first uneven, with poor spinning or knitting properties and, in general, acquired a poor reputation. In the meantime, great improvements were made in rayon production methods and all the improvements were applicable to staple fibre. Dulled and pigmented rayons made their appearance. Italy and Germany continued to experiment with short staple rayon, and when national self-sufficiency became the slogan of the day for political and economic reasons, almost over-night a new industry sprang into being.

Made clean and uniform, the cut rayon fibre has a wide adaptability. Depending upon ultimate use in a textile fabric, practically every property of this new textile material can be regulated beforehand. Its chemical composition determines lustre, propensity to dyes, elasticity and tensile strength. The shape of the fibre, curling, the size and the length, along with the method of spinning and the construction of the fabric, influence the handle and the appearance.

Cut about one-and-a-half inches long, rayon staple can be spun on cotton machinery ; when longer, over two inches with a curl, it can be spun and finished like wool. It can be mixed with cotton, wool with which it blends with excellent results, silk, flax, or rayon filament yarn ; it can also be used in blends of three fibres. All major textile branches are now employing staple fibre in a wide range of fabrics, from fine worsteds and light linen cloths to drapery and decorative fabrics. Used alone, staple fibre has interesting properties.

The principal drawbacks are diminished strength in a wet state, and in general poorer resiliency than the natural fibres. But through scientific research many of the former disadvantages have been overcome ; and progress is continuous. Newer brands of staple fibre are said to be fit even for heavy industrial uses ; others are reported to have water repellent properties. Germany has already developed about sixty different brands of synthetic fibres, some of them have high strength when wet.

PRICE AND COMPETITION WITH OTHER FIBRES

Along with the improvement of the physical properties of rayon staple, better productive methods have lowered costs and prices. The price history of American viscose staple fibre (1½ denier, 1½ inch long) follows :—

Date	Viscose Staple Fibre (cents per lb.)	Viscose Rayon Filament*
Jan., 1928	60	1.50
Oct., 1931	50	.75
Aug., 1932	40	.60
Feb., 1934	34	.65
June, 1936	28	.60
Sept., 1937	25	.63
Jan., 1938	25	.54
May, 1938	25	.49

*(150 denier, first quality, std.)

Last summer the fibre came within the range of the price of "clearing" cotton obtained by Germany in barter deals. Considering that the shipping costs and the waste in spinning of cotton amount to 10 per cent. or more and that staple fibre is clean and uniform, with small loss in the spinning process, the price differential between cotton and staple fibre has not been an obstacle to its development; while as compared with wool its use has resulted in great economies. Due to the fall of raw material prices, particularly of cotton, the competitive position of rayon staple in world markets may have deteriorated somewhat recently.

The relative position of staple rayon fibre among major textile materials in 1937 may be seen from the table below :—

WORLD PRODUCTION OF IMPORTANT TEXTILE FIBRES
(In 000,000 lbs.)

	1913	1929	1937
Cotton	10,560	12,702	18,480
Jute	3,940	4,180	4,070
Wool (Washed) ..	1,531	1,978	1,980
Hemp	1,210	1,170	1,790†
Flax*	1,625	1,340	1,713
Rayon Filament ..	25	435	1,187
Rayon Staple Fibre ..	—	7	622
Silk	64	134	127

* Flax in unfinished state. † 1936.

THE USE IN THE UNITED STATES

In the United States staple fibre has won general acceptance because of its cheapness and its own desirable qualities, and because of the style effect it gives when used in combination with other fibres. The domestic production rose to about 20 million lbs. in 1937 and another 20 million lbs. were imported, chiefly from Japan, Italy and the United Kingdom. The potential market is, however, expanding, especially in women's wear lines where staple fibre is accepted as an innovation enhancing the appearance of the material.

As will be seen from the table below, the combined use of synthetic fibres in women's and men's wear has already exceeded the use of wool.

U.S. CONSUMPTION OF TEXTILE FIBRES IN 1937*
(000,000 of lbs.)

	Women's Wear	Men's Wear	House- hold	Indus- trial	Total	Per cent.
Cotton	750	650	725	1,505	3,630	83.0
Wool	70	140	114	30	354	8.1
Silk	50	3	1	—	54	1.2
Linen	14	8	14	—	36	.8
Rayon	230	46	20	5	301	6.9
Total	1,114	847	874	1,540	4,375	100.0

*After the Textile Economics Bureau, Inc.

COMPULSORY USE OF STAPLE FIBRE

However, the qualities which won the American market for staple rayon fibre hardly account for the extraordinary increase in its use abroad. The fact is that staple fibre was perfected at the most favourable time possible for its development. It permits a far wider use of rayon than was feasible when the product was available only as a filament yarn. It is, within its limitations, a real competitor of wool and to a lesser extent of cotton, being one of the few synthetic competitors of the chief natural commodities which are both cheap and practical. Hence it has been a special boon to the countries, lacking wool and cotton of their own, which are striving to make themselves as independent of imported raw materials as possible; and they have made great efforts to develop its use. The trend toward self-sufficiency is world wide, but naturally is stronger in countries which are short of both raw materials and foreign exchange with which to buy them. Where these countries had the necessary capital equipment, scientific knowledge and manufacturing skill, it was inevitable that they should seek to reduce their purchases of cotton and wool by using rayon fibre, manufactured at home, instead. It is in these countries particularly that its growth has been phenomenal.

The three nations most interested in achieving self-sufficiency, Germany, Italy and Japan, accounted in 1937 for about 89 per cent. of world output of staple fibre. Germany was the first one to adopt regulations requiring mixing of synthetic fibres in textile products. Her ability to supply last year about 30 per cent. of her "clothing textiles" requirements from domestic sources was made possible by the expansion of staple fibre production to over 200 million lbs. Staple fibre accounted for almost 15 per cent. of total German supply of "clothing textiles" in 1937, against 8 per cent. for rayon, 11 per cent. for wool and 49 per cent. for cotton.

On the other hand, Germany is still deficient in wood pulp, the most important raw material necessary for the production of synthetic fibres, although she has been apportioning the annual cut of timber and, rather improvidently, "mining" her forests. The union with Austria will reduce her import requirements to about one-half. Timber was one of the few raw materials of which Austria had an exportable surplus.

STAPLE FIBRE TO EASE PRESSURE ON THE YEN

Japan, the third nation with an important textile industry to enforce the compulsory use of staple fibre, actually tabooed last November pure cotton and woollen fabrics for use within the country. Cotton fabrics must contain at least 30 per cent. of synthetic fibres and woollen yarn or cloths from 10 to over 30 per cent. Under these measures synthetics are expected to replace at least 270,000 bales of foreign cotton per annum, as well as a considerable quantity of imported wool. By the use of rayon and staple fibre, cotton from North China, and wool for Manchukuo and inner Mongolia, Japan hopes to clothe her own population with materials obtained wholly from within the yen currency area, reducing other imports of the textile fibres to the amounts which can be fabricated for export. That the policy, if successful, will ease the problem of meeting an unfavourable trade balance is obvious.

In line with national policy, the new capital control measures, regulating the internal distribution of capital within the Japanese Empire, afford preferential treatment to the rayon staple fibre industry. This assures the continuation of the boom of the industry which was launched in 1933 and last year turned out 175 million lbs. The *Tokyo Oriental Economist* has estimated that the combined rayon yarn and staple fibre installed capacity will reach, by the end of 1938, about 800 million lbs., of which about one-half or 400 million lbs. will be staple fibre.

About 80 per cent. of wood pulp consumed by the Japanese rayon and staple industries in 1937 was of foreign origin, with the United States leading as the source of imports. The cost, however, was only about 80 million yen as compared with 850 and 300 million yen spent for foreign cotton and wool respectively. Imported raw materials, according to the Japanese calculations, form only about 35-40 per cent. of the total cost of production of staple fibre as against 60-80 per cent. for cotton yarn. Through the importation of wood pulp in place of cotton and wool, Japan hopes to save annually about 160 million yen.

The development of staple fibre at this phenomenal rate is something to be considered by the sheepmen and cotton growers of this country as well as the silk farmers of Japan. Among the textile fibres competition and interchange is constantly occurring in some degree, influenced by price changes and style developments. The total poundage of rayon produced does not appear impressive in contrast with the poundage of cotton, and as the world use of fibres expands there will be room in the industries for both materials without necessarily reducing the actual consumption of cotton and wool. Nevertheless, price relations are affected. The higher the price of the old materials, the greater the competition from the new.

The Department of Agriculture is recognising the influence of rayon in the long term price trend of other fibres. One of the arguments employed by Secretary Wallace against any effort to enforce the so-called parity price for cotton—approximately 16 cents a lb.—is that the cotton growers not only would have to give up their export outlets, but that “at such a price competition from rayon and other fabrics would probably

increase to a point which would make it impossible to pass into domestic consumption more than 7 million bales." The effect of rayon competition is felt in other countries at a lower price level than in the United States.

TEXTILE FIBRE PRICES

The following is extracted from the Monthly Report of the National City Bank of New York for July :—

Textile fibres, except rayon, are agricultural products. Only in rayon has production been curtailed as sharply as the commodities already mentioned. Rayon yarn manufacturers, however, have good sized stocks, and have cut prices to the lowest on record. They look to Fall improvement in weaving operations to take excess stocks off their hands.

The cotton situation is complex for brief description. Looking ahead, the important influence on the price is the fact that under the Farm Act as amended, a Government loan becomes mandatory under either of two conditions : (1) If the price at any time during the coming season averages less than 52 per cent. of " parity." Estimating " parity " at 16c, a loan will have to be offered if the price drops below 8.32c, average of the ten Southern markets. (2) If the August crop forecast exceeds a normal year's domestic consumption and exports, which is about 13 million bales.

Unless the crop is a failure it seems that the first of these conditions will at some time be fulfilled, and that there will be a loan of at least 8.32 cents. If the crop is too small to bring the loan provisions into use, prices should advance naturally, until checked by withdrawal of cotton from the 1937 loan. It is difficult to say at what price cotton may be attracted from the loan stock, but grades which command a premium in the market (for which no special provision is made in the loan) might move out at 9½c, and the non-premium grades at a somewhat higher figure. This is a rough indication of the probable price range of the coming crop, although there are other factors in the market.

The season has been a disappointing one from the standpoint of consumption, with little prospect that the world use of American cotton for the twelve months ending July 31 will materially exceed 11,000,000 bales. Consumption of foreign cotton also has declined and the world carry-over will be the largest ever known. With the Government holding 7 million bales it is certain that cotton is bringing a price above what its value would be in a free and open market, and the loan stock is likely to act as a price depressing factor for a long time to come.

CELLULOSE FROM REED GRASS—EXPERIMENTS IN MANCHUKUO

The investigations commenced some considerable time ago by the Kanegafuchi Cotton Spinning Co. into the production of cellulose from

reed grass are reported to have given excellent results, and to have solved the problem of sources of cellulose in the timberless regions of the Far East. The factory set up comparatively recently in Yingkow for large scale production of cellulose from reed grass provides a product containing, it is said, 93 per cent. pure cellulose (as compared with 88 per cent. in U.S.A.). From this raw material the spinning mills of the Kanegafuchi concern are producing a 120 denier yarn of excellent quality. At present the Yingkow factory has a daily production of 16 tons; this is to be raised shortly to 20 tons and at a later date to 50 tons.

The raw material for cellulose production, namely, reed grass, is available in the immediate vicinity to an amount of 100,000 tons annually. The cost of production of the reed grass cellulose amounts to 11 sen per lb. although it is expected that very shortly this will be reduced to 6 or even 5 sen. The figure of 11 sen nevertheless provides a profitable basis of costing for the synthetic fibre industry. The Kanegafuchi concern has put in hand the construction of a second cellulose factory at Gishu, the industrial centre on the border between Korea and Manchukuo. Another factory for the same purpose is to be set up in the vicinity of Tientsin by the Toyo Paper Co. This factory is to produce 18,000 tons cellulose from reed grass and about 40,000 tons paper.

Should these plans continue to show successful development then it is not beyond the bounds of possibility that in the not too distant future reed grass will take the place of Canadian and Scandinavian timber as a raw material for cellulose. The supplies of reed grass are inexhaustible and, provided the roots are not destroyed, the grass renews itself year by year.

(Textile Weekly, Manchester)

GERMANY—COTTONIZATION OF HEMP

According to the *Textile Weekly* of Manchester, negotiations which have been taking place it is said for some months, are likely to culminate shortly in the formation of a company in Plauen for the cottonizing of hemp. This cottonized hemp in the form of tufts would be worked up chiefly in the cotton and wool spinning branch for mixing purposes. The new project is to be backed by the cotton spinning industry in Saxony and Northern Bavaria. A suitable building for the new mill is available in a former paper factory. Machinery is said to have been already ordered and it is considered possible that operation may be commenced towards the end of this year.

W.P.A. TEXTILE PURCHASES IN U.S.A.

Further to the scheme of the Works Progress Administration for the purchase of cotton textiles in U.S.A. (see page 409 of the *International*

Cotton Bulletin, April, 1938, No. 63), we learn from a recent issue of the *New York Journal of Commerce*, that bids on a record supply of 57,704,900 yards of cotton textiles were invited in Washington recently by the Procurement Division of the Treasury Department. The bids were opened on June 6, deliveries to be completed by September 1.

Although reports of heavy impending Government purchases have been heard, the volume of requirements was hardly expected to reach such proportions. Included in the specifications are 6,000,000 yards of print cloths, 5,000,000 yards of chambrays, 4,000,000 yards of denims and substantial quantities all in excess of a million yards, of bleached and unbleached muslin, percales, broadcloths and outing flannels.

A substantial upturn in cotton goods markets is expected to result from the announced intention of the Government to purchase such a large quantity of cotton textiles. Stocks of goods now overhanging the market will be substantially reduced as a result of the Government buying programme, and it is quite possible that shortages will develop in a number of divisions once these goods are lifted from the market.

NEW USES FOR COTTON

The use of cotton bagging as a covering for 16,000 bales of cotton was among the projects sponsored during the past year in connection with the cotton diversion programme for encouragement and development of new uses for cotton, the U.S. Agricultural Adjustment Administration announced recently.

Other new uses for which demonstrations were conducted included the use of cotton fabric as a reinforcement for airport runways; as a covering for tobacco plant beds while the beds were being fumigated for the control of blue mould; as a covering for dried fruits to prevent insect damage during the curing process; for lining irrigation canals and terrace outlet ditches and as a covering for highway cuts and fills; as a covering to protect tree seedlings, and as a roofing and side-wall material for covering houses.

Approximately 1,325,000 square yards of cotton materials were supplied or approved for purchase and shipment to co-operating agencies in forty States for the various demonstrations, the purchases being made through the Federal Surplus Commodities Corporation. The materials were for use on 142 projects. The total cost was about \$120,000.

The projects for which cotton materials were supplied were located in many prominent States.

The use of cotton bagging on bales of cotton was undertaken with the co-operation of various agricultural colleges, experiment stations and State prison farms. A total of 120,000 square yards of bagging was

supplied for the project, this quantity being sufficient for covering 16,000 bales. Reports received to date from the co-operating agencies indicated that the cotton material proved well suited for use as a bale covering. It has been pointed out that if cotton bagging were in general use in this country, approximately 150,000 bales of cotton would be required to manufacture the bagging needed to cover a crop of 15,000,000 bales.

About 184,000 square yards of cotton fabric were supplied or approved for use in the reinforcement of airport runways, streets, roadways, walks and paths. As in the case of demonstrations of the use of cotton fabric in highway construction conducted under the cotton diversion programme in previous years, observation of the use of this material on airport runways will be necessary over a considerable period before the results can be determined.

In tobacco growing areas where plant beds are subject to damage from blue mould, more than 7,000 square yards of cotton cloth were supplied to co-operating agencies for use as portable coverings in connection with the fumigation of the plant beds.

About 12,000 square yards of cotton fabric were supplied to co-operating agencies in California for use as protective coverings for trays of dried fruit during the curing process. The purpose of this demonstration was to show how the cloth coverings protect the fruit from insect damage and thus improve its quality.

The largest use of cotton fabric in connection with the programme during the year was as a covering to shade or protect tree seedlings, shrubs, vegetables and other plants. More than 485,000 square yards of materials were supplied or approved for these purposes—principally for the protection of tree seedlings.

On a number of projects in which the Bureau of Reclamation and the Bureau of Agricultural Engineering co-operated, arrangements were completed for the trial use of 98,000 square yards of cotton fabric as a lining for canals and terrace outlet ditches. Various State highway departments and the Forest Service co-operated in the trial use of about 115,000 square yards of fabric as a covering for fills and cuts. In these trials the fabric is used to hold the soil on slopes until grasses and other plants become sufficiently rooted to keep the slopes from washing.

The cotton diversion programme is supervised by the Marketing Section, Division of Marketing and Marketing Agreements, AAA, under legislation passed by Congress in 1935, making funds available to the Department of Agriculture from customs receipts for encouraging domestic consumption of agricultural commodities through the development of new uses. Demonstrations of new uses of cotton are carried out in co-operation with State and federal agencies, agricultural colleges, experiment stations and other non-profit organisations. Such demonstrations are limited to uses which have prospects of becoming commercially practicable. Following is a summary of material supplied or approved for purchase and shipment to co-operating agencies from August, 1937, through May, 1938 :—

<i>Use</i>	<i>Square Yards</i>
Ditch lining	98,069
Lining for levees and revetments	2,049
Lining for dams and reservoirs	17,781
Covering for fills or cuts	114,897
Reinforcing airport runways, roads, paths or walks ..	183,590
Covering for fruits and vegetables while growing, ripening or curing	12,467
Covering to shade or protect tree seedlings, etc.	485,823
Portable covering for fruits, vegetables, etc., while being fumigated, sprayed or dusted	7,059
Cage covering for propagation of insect parasites in the control of Curly Top disease of vegetables	214
Bee hive covers	117
Outside covering material for houses	51
Covering for bales of cotton	121,298
Bags for agricultural products	281,968
TOTAL ..	1,325,383

Sheep clothed in cotton duck coats or rugs after shearing are reported to yield longer, cleaner and tipless fleeces, and also better mutton. Sir Frederick McMaster, sheep rancher of Dalkieth, Australia, is credited by Paul Seydel in *Cotton*, with being the originator of this innovation.

ENGLISH TEXTILE INSTITUTE ANNUAL CONFERENCE

JUNE 21-25, 1938

The English Textile Institute held its Annual Conference this year at Peebles on June 21 to 25. The following subjects featured prominently on the Conference agenda :—

- (1) Recruitment for the Textile Industries.
- (2) The Training of Operatives.
- (3) Training for Technical Management.
- (4) The Training of Salesmen and Textile Designers, etc. etc.

INTERNATIONAL WOOL CONFERENCE

LONDON, JUNE 16-17, 1938

The Annual Conference of the International Wool Textile Organisation took place in London on June 16 and 17 last. Delegates were present from twelve woollen manufacturing countries. Among the subjects forming the agenda were the following :—

- Wool Substitutes, Consumption and Prices.
- The Definition of "Wool."
- The Sanctity of Contracts.
- Wool "Promotion."
- Customs Duties on Mixed Artificial Materials, etc. etc.

Reviews on Current Cotton Literature

"THE MARKETING OF RAW COTTON IN INDIA," by M. L. Dantwala. Published by Longmans, Green & Co. Ltd., 39 Paternoster Row, London, E.C.4. Price 9/- net.

This book is an attempt to make a systematic study of the marketing of raw cotton in India from the farm to the Exchange. Cotton is the most important commercial crop in the country, and has a highly developed "organised market." The intricacies of "an organised market" need to be fully understood, because its methods are being extended to other articles of trade also. This book is the first systematic attempt of its kind, and shows what private effort can achieve in this type of research work, provided the co-operation of the trade is obtained. The structure and organisation of the internal trade of the country on the one hand, and the working of the Cotton Exchange on the other, have a vital bearing on the price which the consumers pay and the agriculturists receive. Mr. Dantwala has examined these problems with a critical insight into them, and has suggested schemes of improvement in the light of the experience of other countries.

"COMMERCIAL RELATIONS BETWEEN INDIA AND JAPAN," by C. N. Vakil and D. N. Maluste. Published by Longmans, Green & Co. Ltd., 39 Paternoster Row, London, E.C.4. Price 9/- net.

The increasing interference of the State in the conduct of trade in different countries, recent changes in Indian commercial policy, particularly the adoption of preferential duties for Empire goods and the Indo-Japanese Trade Agreement, the appointment of Indian Trade Commissioners in several foreign centres—these tendencies establish the need for a more systematic study of India's trade relations with other countries and of problems arising from the same. The present volume aims at such a study of Indian commercial relations with Japan. Indian trade with Japan has been increasing since the war, and it is next in importance to that with the U.K. Besides, the competition of cheap Japanese goods has affected India in several ways. The commercial relations with Japan are now largely determined by the Indo-Japanese Trade Agreement. This volume discusses these problems critically and is a first study of its kind. It also draws attention to the valuable lessons India may have from the experience of Japan in developing her economic status.

THE TENTH ANNUAL INTERNATIONAL EDITION OF THE COTTON TRADE JOURNAL. Published by the Cotton Trade Journal Inc. of New Orleans, La., U.S.A. Price \$2.50.

A very comprehensive survey of both the cotton growing and the cotton and rayon spinning and manufacturing industries in all the principal

cotton producing and manufacturing countries of the world. The Editor has, as usual, spared no pains to produce what in our opinion is a well-written and printed book.

"THE EMPIRE COTTON GROWING REVIEW," July, 1938. Published quarterly for the Empire Cotton Growing Corporation by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1. Annual subscription 5/-, post free.

Among the many interesting articles appearing in the current issue of the Review are the following :—

Factors of Cotton Quality, by Dr. A. J. Turner ; The Origin of Cultivated Cotton, by R. Ruggles Gates ; Cotton in Nyasaland, by H. C. Ducker.

BOOKS RECEIVED

"REPORT OF THE ADMINISTRATIVE COUNCIL OF THE CORPORATION SUBMITTED TO THE SEVENTEENTH ANNUAL GENERAL MEETING ON MAY 25, 1938." By the Empire Cotton Growing Corporation, King's Buildings, Dean Stanley Street, Millbank, London, S.W.1.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN THE NETHERLANDS, MARCH, 1938." By Mr. R. V. Laming, C.B.E., Commercial Secretary to H.M. Legation, The Hague. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 1s. 6d. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN IRAQ, 1935-37." By Mr. J. P. Summerscale, late Commercial Secretary to H.M. Embassy at Bagdad. Printed and published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 1/- net.

"ANNUAL REPORT OF THE COMMITTEE FOR THE YEAR 1937." By the Indian Chamber of Commerce, Calcutta. Published by the Secretary, Indian Chamber of Commerce, 135 Canning Street, Calcutta, India.

"SHORT HISTORY OF THE BOMBAY COTTON MARKET." By the East India Cotton Association Ltd. The Cotton Exchange, Marwari Bazaar, Bombay. Printed by the "Times" of India Press, Bombay.

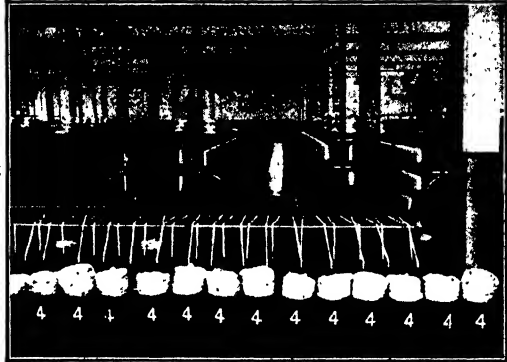


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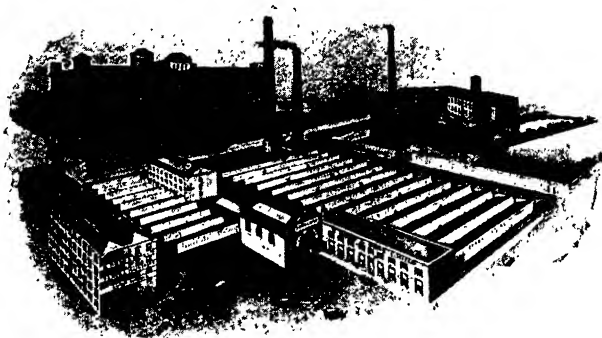
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